

IDAHO EMPLOYMENT

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February 2004 Issue/December 2003 Data

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State Overview

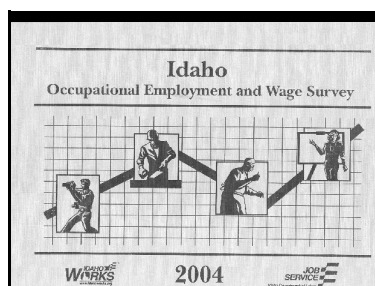
IDAHO'S UNEMPLOYMENT RATE DECREASES TO 4.8 PERCENT

Idaho's seasonally adjusted unemployment rate for December 2003 was 4.8 percent, down two-tenths of a percentage point from November and 1.3 percentage points below the 6.1 percent rate experienced in November 2002. It was nine-tenths of a percentage point below the national unemployment rate of 5.7 percent, which was down two-tenths of a percentage point from November. The December 2003 rate is the lowest that Idaho has experienced since March 2001 when the rate was 4.7 percent. The nation was at its lowest rate, 5.7 percent, since October 2002. During 2003, Idaho's unemployment rate has ranged from a low of 4.8 percent in December to a high of 5.6 percent in April, July, and August.

Idaho's seasonally adjusted *Civilian Labor Force* in December 2003 totaled 685,600, a decrease of 2,100 from November. There were 1,800 fewer people unemployed in December. The number of employed Idahoans also decreased between November and December, but only by 300 persons. The inclement weather, the uncertainty of the holiday sales, and a few layoffs had an adverse impact on job gains in December. As in previous months the decrease in the number unemployed not only is a reflection of those individuals who found jobs, but also those that have become discouraged and left the labor force. The decrease in both the number of persons employed and unemployed was responsible for the decrease in December's labor force. December had the smallest statewide labor force since August when it was 685,400.

2003 REVISITED

A review of Idaho's 2003 Labor Force starts in the FYI section on page 21. This special section features annual average data and a look forward to 2004 and beyond.



The Idaho 2004 Wage Survey is here at www.jobservice.ws



The impact of the slowly improving economy during 2003 is reflected in the year-over-year changes in the labor force. In December 2003 the number of individuals in Idaho's labor force was 1,100 more than in December 2002. The number of individuals employed in December 2003—652,800—was 9,900 more than the number employed in December 2002. The decrease in the number of unemployed over the year was 8,800. These numbers result in an increase in the *Civilian Labor Force* of 0.2 percent and a small, but positive increase in *Total Employment* of 1.5 percent. At the same time last year, it was reported that the percent change from December 2001 to December 2002 in *Total Employment* was a negative nine-tenths.

AREA AND COUNTY LABOR FORCE HIGHLIGHTS

Two counties reported double-digit unemployment rates in December: Adams County at 18.4 percent and Shoshone County at 10.0 percent. (State Table 1 on page 3 provides the month's labor force statistics for Idaho counties, designated labor market areas, and selected cities.)

Unemployment rates at or below 3.0 percent in December 2003 occurred in four counties: Franklin County at 3.0 percent, Latah County at 2.9 percent, Owyhee County at 1.8 percent, and Madison County at 1.6 percent. Madison County also had the lowest annual average with a preliminary unemployment rate of 1.8 percent. Owyhee County was the only other county that preliminary data shows had an annual average unemployment below 3.0 percent at 2.3 percent. Owyhee County is in Idaho's southwestern corner and is very sparsely populated, at 1.1 persons per square mile, and over 40 percent of the county's jobs are in government. Agriculture and ranching are the other main sources of jobs. These three sectors tend to have stable employment. Madison County in the northeastern part of the state has an economy that is driven by two primary factors: potatoes and university students. The county is the hub of the upper Snake River crop growing region and potatoes are the principal crop. Its hub status also results in trade and service jobs related to agriculture. Brigham Young University-Idaho (BYU-Idaho) is a rapidly growing private four-year university with more than 11,200 students. The school's growth has spurred jobs in *Construction*, *Retail Trade*, and *Other Services*. The student population, many with international language proficiencies, also has been an incentive for call centers to locate in the area.

The Cassia-Minidoka Labor Market Area (LMA) had the highest December unemployment rate among the LMAs at 7.3 percent. The high rate is mainly a result of the recent closure of the J. R. Simplot potato processing plant in Heyburn. The Bonneville LMA had the lowest rate at 3.6 percent and the state's most populated area, the Boise City Metropolitan Statistical Area (MSA), had a 4.5 percent unemployment rate. This was an improvement from the November rate of 4.8 percent.

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or to the Regional Labor Economists noted in each area news section.

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AGRICULTURAL EMPLOYMENT

Two major developments within the Idaho agricultural employment picture occurred in December: 1) above average snowfall that gave some promise of ending multiple years of drought; and, 2) the discovery of mad cow disease in the Northwest United States.

Drought or short water conditions have persisted throughout southern Idaho for the last three to four years and even longer in some areas. Lower than average precipitation, stored water depletion, and higher than average temperatures are the reasons for the water shortages. While water shortages affect almost all of Idaho's economic activity, it affects agriculture significantly. Not only is water needed to grow crops, short water conditions, including accompanying hot weather conditions, result in poorer crop quality and yields, plant diseases, and high energy costs. So December's wet, wintry weather was very welcomed. It is still too soon to declare that a 2004 drought is a remote possibility because so much water is needed to catch up. The mountain soils under the snow pack are extremely dry and will soak up much of the runoff water. The Bear Lake area in Idaho's southeast corner was missed by the early storms and snow pack/water measurements remain substantially below normal.

Just before Christmas, a dairy cow from a herd in Washington state was discovered to have *bovine spongiform encephalopathy* (BSE) or mad cow disease. The cow was part of a group of 81 cows purchased in Canada and moved into the U.S. In addition, some other cows from the Canadian source herd were moved to other dairy farms in Washington, Oregon, and Idaho. Eventually, 255 cows were identified as being related in some way to the source herd.

BSE has been known in very rare cases to be potentially fatal to humans who consume contaminated meat, so aggressive action must be taken to stop the potential spread of the disease and to eradicate it when it is found. All cattle related to the source herd were destroyed and no additional BSE cases were discovered. However, the BSE incident caused immediate reaction. U.S. beef exports to some countries were banned, domestic consumers expressed concern by curtailing purchases of beef, and industry and government officials had to mount a large public relations campaign. Detailed

State Table 1: December 2003 Labor Force (preliminary)				
Seasonally Adjusted	Labor Force	Unemp.	% Unemp.	Total Emp.
Seaport LMA	35,061	1,298	3.7	33,762
Nez Perce County	22,969	716	3.1	22,253
Asotin County, WA	12,092	582	4.8	11,509
Boise City MSA	245,963	11,052	4.5	234,911
Ada County	176,226	6,513	3.7	169,714
Canyon County	69,737	4,539	6.5	65,198
Pocatello City MSA*	40,079	1,803	4.5	38,276
Bonneville LMA	81,506	2,901	3.6	78,606
Bingham County	22,031	854	3.9	21,177
Bonneville County	47,759	1,615	3.4	46,144
Butte County	1,522	63	4.2	1,458
Jefferson County	10,194	368	3.6	9,826
Cassia-Minidoka LMA	20,046	1,473	7.3	18,573
Cassia County	10,049	645	6.4	9,404
Minidoka County	9,997	828	8.3	9,169
Idaho-Lewis LMA	8,037	545	6.8	7,491
Idaho County	6,586	489	7.4	6,097
Lewis County	1,451	56	3.9	1,395
Panhandle LMA	90,922	6,248	6.9	84,674
Benewah County	4,148	337	8.1	3,811
Bonner County	17,488	1,189	6.8	16,299
Boundary County	4,356	350	8.0	4,006
Kootenai County	58,655	3,738	6.4	54,917
Shoshone County	6,275	634	10.1	5,641
Magic Valley LMA	55,874	2,060	3.7	53,814
Gooding County	7,824	252	3.2	7,572
Jerome County	10,369	387	3.7	9,982
Twin Falls County	37,681	1,421	3.8	36,260
Adams County	1,835	337	18.4	1,498
Bear Lake County	3,025	147	4.9	2,878
Blaine County	12,615	424	3.4	12,192
Boise County	2,526	168	6.7	2,358
Camas County	480	21	4.3	459
Caribou County	3,185	220	6.9	2,964
Clark County	620	36	5.9	584
Clearwater County	3,492	280	8.0	3,212
Custer County	2,158	137	6.4	2,021
Elmore County	9,453	487	5.1	8,967
Franklin County	5,425	165	3.0	5,260
Fremont County	5,140	295	5.7	4,845
Gem County	5,664	350	6.2	5,315
Latah County	15,616	447	2.9	15,169
Lemhi County	3,693	248	6.7	3,445
Lincoln County	2,373	116	4.9	2,257
Madison County	12,145	192	1.6	11,953
Oneida County	1,684	55	3.2	1,629
Owyhee County	4,432	80	1.8	4,352
Payette County	9,424	690	7.3	8,734
Power County	3,210	272	8.5	2,938
Teton County	4,016	141	3.5	3,875
Valley County	3,802	301	7.9	3,501
Washington County	4,154	361	8.7	3,793
State of Idaho	685,576	32,766	4.8	652,810
Idaho Cities				
Boise	115,903	4,266	3.7	111,637
Coeur d'Alene	20,706	1,063	5.1	19,643
Idaho Falls	29,728	1,075	3.6	28,653
Lewiston	19,473	553	2.8	18,920
Nampa	21,288	1,553	7.3	19,735
Pocatello	28,146	1,313	4.7	26,832
Twin Falls	19,687	830	4.2	18,857

* Pocatello MSA includes all of Bannock County.

information concerning the incident can be obtained at <http://www.aphis.usda.gov/lpa/issues/bse/bse.html>

NONFARM PAYROLL JOBS

State Table 2 on page 5 provides state industry employment data for the current month, previous month, and one year ago.

Nonfarm Payroll Jobs declined by 2,900 in December from November 2003. The *Goods-Producing Industries* lost 2,000 jobs for a 2.1 percent decline compared to the state's total job loss of 0.5 percent. A modest job loss from November to December is not an unusual event. Since 1999, a monthly job loss of 2,000-3,000 has been the pattern. Year-over-year, however, *Nonfarm Payroll Jobs* had 6,200 more jobs in December 2003 for a 1.1 percent growth rate.

More than half of the total job loss occurred in *Construction*, which declined by 1,500 jobs month-over-month. The main reason was the weather. It was cold and snowy throughout most of the state from mid-November through December. Road repair and maintenance projects also were winding up, as it is normal practice to end the outdoor work season in anticipation of winter weather.

An additional 900 jobs were lost in *State and Local Government*, primarily in *Education*. This, too, is

not unusual as the fall term ends and staff adjustments are made. Also, students who had campus jobs leave them for one reason or another.

The loss of 900 jobs in *Administrative & Support Services* was a result of a decline in call center and temporary staffing businesses. Some call centers have lost business due to the "no call" listing system. Workers placed through the temporary staffing firms often decline work during the holiday season or the host businesses experience slack activity during this time.

Only modest employment gains occurred in *Retail Trade* and *Leisure & Hospitality*. Merchants were cautious upon entering the holiday shopping season and many apparently did not hire additional staff, as their already hired employees absorbed the shopping rush. Early reports indicate that sales were "good but not spectacular" and sales tax receipts were slightly below predicted amounts at month end.

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Website Update — Publications Provide Perspective

In addition to wage information, employment statistics, occupational data, etc., the Idaho Department of Labor's labor market information home page—www.jobservice.ws—includes several publications, including back issues of this newsletter, Idaho Employment. Simply log onto the website, click on "Publications" in the blue menu on the left and scroll through the alphabetical list of publications until you find the one you want. Selections include:

- Affirmative Action Statistics
- Agricultural Wage and Practice Surveys
- Basic Economic Data
- County Profiles
- County Unemployment Insurance Profiles Crop Activity Lists
- Employee Benefits Survey
- Idaho Employment Newsletter
- Idaho Farm Update
- Idaho Unemployment Insurance (The Red Book)
- Labor Force in Idaho
- Occupational Employment & Wages in Idaho

County Profiles are one of the most widely-used publications and are updated monthly to reflect the most recent labor force numbers such as unemployment rates. The mix of nonfarm payroll jobs by industry is included along with covered wage information and per capita income in a 10-year period. Population changes are shown and a description of the county's attributes also are included.

www.jobservice.ws

Besides the current **Idaho Employment** newsletter that is available on the web page, users also can access past issues, which are organized by region. Because each regional report includes area developments, this can be helpful for researching events within specific regions of the state.

Explore the website and discover all types of information. If you need help, contact any of the people listed throughout this publication or send an e-mail to Imi@jobservice.us.

State Table 2: Nonfarm Payroll Jobs

BY PLACE OF WORK	% Change From				
	Dec 2003*	Nov 2003	Dec 2002	Last Month	Last Year
Nonfarm Payroll Jobs**	576,900	579,800	570,700	-0.5	1.1
GOODS-PRODUCING INDUSTRIES	101,200	103,200	103,400	-1.9	-2.1
Natural Resources & Mining	3,300	3,600	3,800	-8.3	-13.2
Logging	1,700	1,900	2,100	-10.5	-19.0
Mining	1,600	1,700	1,700	-5.9	-5.9
Metal Ore Mining	400	400	500	0.0	-20.0
Construction	36,900	38,400	36,000	-3.9	2.5
Manufacturing	61,000	61,200	63,600	-0.3	-4.1
Durable Goods	37,800	37,800	39,800	0.0	-5.0
Wood Product Manufacturing	6,900	7,000	7,600	-1.4	-9.2
Sawmills & Wood Preservation	2,900	2,900	3,100	0.0	-6.5
Veneer & Engineered Products	900	1,000	1,300	-10.0	-30.8
Other Wood Product Manufacturing	3,100	3,100	3,200	0.0	-3.1
Fabricated Metal Product Manufacturing	3,600	3,600	3,700	0.0	-2.7
Machinery Manufacturing	2,600	2,500	2,900	4.0	-10.3
Computer & Electronic Product Manufacturing	16,000	15,900	17,100	0.6	-6.4
Transportation Equipment Manufacturing	2,200	2,200	2,000	0.0	10.0
Other Durable Goods	6,500	6,600	6,500	-1.5	0.0
Nondurable Goods	23,200	23,400	23,800	-0.9	-2.5
Food Manufacturing	15,000	15,300	15,800	-2.0	-5.1
Fruits & Vegetable Preserving & Specialty	7,600	7,600	8,100	0.0	-6.2
Paper Manufacturing	1,700	1,600	1,700	6.3	0.0
Printing & Related Support Activities	2,100	2,100	2,000	0.0	5.0
Chemical Manufacturing	1,800	1,800	1,900	0.0	-5.3
Other Nondurable Goods	2,600	2,600	2,400	0.0	8.3
SERVICE-PROVIDING INDUSTRIES	475,700	476,600	467,300	-0.2	1.8
Trade, Transportation, & Utilities	120,100	120,100	117,900	0.0	1.9
Trade	100,800	100,700	99,200	0.1	1.6
Wholesale Trade	24,500	25,000	24,800	-2.0	-1.2
Wholesalers, Durable Goods	11,400	11,400	11,800	0.0	-3.4
Wholesalers, Nondurable Goods	11,300	11,300	11,100	0.0	1.8
Retail Trade	76,300	75,700	74,400	0.8	2.6
Motor Vehicle and Parts Dealers	11,000	11,000	10,800	0.0	1.9
Building Material and Garden Equipment	7,700	7,900	7,600	-2.5	1.3
Food & Beverage Stores	12,200	12,300	12,800	-0.8	-4.7
General Merchandise Stores	16,700	16,500	15,800	1.2	5.7
Transportation, Warehousing, & Utilities	19,300	19,400	18,700	-0.5	3.2
Utilities	1,900	1,900	1,900	0.0	0.0
Transportation & Warehousing	17,400	17,500	16,800	-0.6	3.6
Rail Transportation	1,300	1,300	1,300	0.0	0.0
Truck Transportation	8,500	8,500	8,300	0.0	2.4
Information	9,400	9,400	9,200	0.0	2.2
Telecommunications	3,500	3,500	3,200	0.0	9.4
Financial Activities	27,600	27,500	25,500	0.4	8.2
Finance & Insurance	20,600	20,600	19,000	0.0	8.4
Real Estate & Rental & Leasing	7,000	6,900	6,500	1.4	7.7
Professional & Business Services	73,300	74,100	69,800	-1.1	5.0
Professional, Scientific, & Technical	29,000	28,900	28,200	0.3	2.8
Scientific Research & Development	7,300	7,200	7,300	1.4	0.0
Management of Companies & Enterprises	8,700	8,700	8,500	0.0	2.4
Administrative & Support & Waste Management	35,600	36,500	33,100	-2.5	7.6
Administrative & Support Services	34,400	35,300	31,700	-2.5	8.5
Educational & Health Services	63,200	63,000	61,200	0.3	3.3
Educational Services	7,200	7,200	7,000	0.0	2.9
Health Care & Social Assistance	56,000	55,800	54,200	0.4	3.3
Hospitals	13,500	13,400	13,500	0.7	0.0
Leisure & Hospitality	52,300	51,700	53,200	1.2	-1.7
Arts, Entertainment, & Recreation	6,600	6,300	8,100	4.8	-18.5
Accommodation & Food Services	45,700	45,400	45,100	0.7	1.3
Accommodation	7,100	6,600	7,400	7.6	-4.1
Food Services & Drinking Places	38,600	38,800	37,700	-0.5	2.4
Other Services	17,700	17,700	17,400	0.0	1.7
Total Government	112,100	113,100	113,100	-0.9	-0.9
Federal Government	13,400	13,500	12,500	-0.7	7.2
State & Local Government	98,700	99,600	100,600	-0.9	-1.9
State Government	29,300	30,000	29,300	-2.3	0.0
State Government Education	14,400	15,000	14,600	-4.0	-1.4
State Government Administration	14,900	15,000	14,700	-0.7	1.4
Local Government	69,400	69,600	71,300	-0.3	-2.7
Local Government Education	36,300	36,500	38,100	-0.5	-4.7
Local Government Administration	30,200	30,200	30,500	0.0	-1.0
Local Government Tribes	2,900	2,900	2,700	0.0	7.4

*Preliminary Estimate

** Estimates include all full or part time wage and salary workers who worked or received pay in the following industry groups during the pay period ending nearest the 12th of the month.

State Table 3: Economic Indicators

	Dec 2003	Nov 2003	Dec 2002	% Change From	
				Last Month	Last Year
IDAHO LABOR FORCE ⁽¹⁾					
Seasonally Adjusted					
Civilian Labor Force	685,600	687,700	684,500	-0.3	0.2
Unemployment	32,800	34,600	41,600	-5.2	-21.2
Percent of Labor Force Unemployed	4.8	5.0	6.1		
Total Employment	652,800	653,100	642,900	0.0	1.5
Unadjusted					
Civilian Labor Force	681,100	687,500	680,600	-0.9	0.1
Unemployment	34,900	33,000	43,700	5.8	-20.1
Percent of Labor Force Unemployed	5.1	4.8	6.4		
Total Employment	646,200	654,500	636,900	-1.3	1.5
U. S. UNEMPLOYMENT RATE ⁽²⁾	5.7	5.9	6.0		
U.S. CONSUMER PRICE INDEX ⁽²⁾					
Urban Wage Earners & Clerical Workers (CPI-W)	179.9	180.7	177.0	-0.4	1.6
All Urban Consumer (CPI-U)	184.3	185.0	180.9	-0.4	1.9
AGRICULTURE					
Agriculture Employment	34,020	37,550	28,590	-9.4	19.0
Operators	9,010	9,010	9,010	0.0	0.0
Unpaid Family	360	360	410	0.0	-12.2
Hired Workers	24,650	28,180	19,170	-12.5	28.6
UNEMPLOYMENT INSURANCE					
Claims Activities					
Initial Claims ⁽³⁾	20,743	15,695	22,227	32.2	-6.7
Weeks Claimed ⁽⁴⁾	124,780	74,133	125,080	68.3	-0.2
Benefit Payment Activities⁽⁵⁾					
Weeks Compensated	102,694	60,630	99,725	69.4	3.0
Total Benefit \$ Paid	\$22,792,287	\$13,338,539	\$22,067,557	70.9	3.3
Average Weekly Benefit Amount	\$221.94	\$220.00	\$221.28	0.9	0.3
Covered Employers	41,539	41,600	40,633	-0.1	2.2
Total Benefit \$ Paid During Last 12 Months ⁽⁴⁾	\$220,065,775	\$219,341,045	\$217,384,029	0.3	1.2
(1) Preliminary Estimate					
(2) Source: U.S. Bureau of Labor Statistics					
(3) Includes all entitlements/programs on Intrastate and Interstate Agent, New, and Additional Claims					
(4) Includes all entitlements/programs, Intrastate and Interstate Agent					
(5) Includes all entitlements/programs, Total Liable Activities					



PANHANDLE

BENEWAH, BONNER, BOUNDARY, KOOTENAI, & SHOSHONE COUNTIES

EMPLOYMENT TRENDS

The Panhandle's seasonally adjusted unemployment rate edged down from 7.0 percent in November to 6.9 percent in December, as the Panhandle enjoyed an exceptionally strong start to the winter tourist season. A year before, in December 2002, lack of snow gave the winter tourist season a miserable start, and low lumber prices caused temporary shut-downs of three major lumber mills pushing the unemployment rate up to 9.2 percent. The 1.7 percent increase in *Nonfarm Payroll Jobs* between December 2002 and December 2003, while not impressive, does indicate an economic resurgence, as does the good news in the following area developments.

AREA DEVELOPMENTS

Bonner County

- Sandpoint recently achieved a major economic development goal when McCall Aviation announced it would start commuter flights to Seattle and Boise from the Sandpoint Airport on May 3. McCall Aviation, a regional air carrier based in McCall, will offer one round-trip flight to Boise and one round-trip flight to Seattle's Boeing Fields every Monday, Tuesday, Thursday, and Friday. The turbine-powered Cessna Caravans can carry up to nine passengers. The flights will save time and money for the 1,700 businesses in Bonner and Boundary Counties, as well as increasing tourist visits.
- Dover, a city of 350 people three miles west of Sandpoint, is likely to become much larger. Developer Ralph Sletager has won the city council's approval of the conceptual plan for a 195-acre development on the west side of Dover between U.S. Highway 2 and the Pend Oreille River. Up to 600

Panhandle Table 1: Labor Force & Employment

	Dec 2003*	Nov 2003	Dec 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	90,920	91,350	92,210	-0.5	-1.4
Unemployed	6,250	6,410	8,480	-2.5	-26.3
% of Labor Force Unemployed	6.9	7.0	9.2		
Total Employment	84,670	84,940	83,730	-0.3	1.1
Unadjusted					
Civilian Labor Force	91,140	91,480	92,460	-0.4	-1.4
Unemployed	6,990	5,970	9,280	17.1	-24.7
% of Labor Force Unemployed	7.7	6.5	10.0		
Total Employment	84,150	85,510	83,180	-1.6	1.2
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	69,670	70,260	68,480	-0.8	1.7
Goods-Producing Industries	13,590	14,160	12,910	-4.0	5.3
Natural Resources & Mining	1,620	1,600	1,600	1.3	1.3
Construction	4,890	5,410	4,570	-9.6	7.0
Manufacturing	7,080	7,150	6,740	-1.0	5.0
Wood Product Manufacturing	2,660	2,740	2,700	-2.9	-1.5
Other Manufacturing	4,420	4,410	4,040	0.2	9.4
Service-Providing Industries	56,080	56,100	55,570	0.0	0.9
Trade, Transportation, & Utilities	14,040	13,830	13,690	1.5	2.6
Wholesale Trade	1,370	1,480	1,360	-7.4	0.7
Retail Trade	10,920	10,600	10,560	3.0	3.4
Utilities	380	380	380	0.0	0.0
Transportation & Warehousing	1,370	1,370	1,390	0.0	-1.4
Information	1,140	1,110	1,230	2.7	-7.3
Financial Activities	2,890	2,890	2,950	0.0	-2.0
Professional & Business Services	6,120	6,100	6,770	0.3	-9.6
Educational & Health Services	7,040	7,080	6,880	-0.6	2.3
Leisure & Hospitality	7,780	7,820	7,430	-0.5	4.7
Other Services	2,090	2,090	2,180	0.0	-4.1
Government Education	5,260	5,390	5,000	-2.4	5.2
Government Administration	8,430	8,500	8,340	-0.8	1.1
Government Tribes	1,290	1,290	1,100	0.0	17.3

* Preliminary estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

homes will be built at the Dover Bay development that will include a marina, a public riverfront park, and trails.

Boundary County

- Ernie Johnson, owner of the Lantern in Bonners Ferry, plans to turn the 10-room motel with a small restaurant and bar into a "modern truck plaza." Between 700 and 1,000 trucks travel through Bonners Ferry each day. Johnson believes the Lantern, located on Highway 95 on the south side of town, is ideally situated to serve those trucks. The closest full-service truck stops are in Post Falls and Calgary, British Columbia. Johnson plans to build a 15-room motel, a 24-hour 75-seat restaurant, a 6,000-square-foot convenience store, and a new bar. In addition, he will install a 20-

space RV park in the back. Johnson hopes to start construction this summer. After completing the new buildings, Johnson will demolish the current buildings. The Lantern currently employs seven people; after its transformation, it could employ 20 to 30 more people.

Kootenai County

- The New Year began with good news when Verizon announced it was opening a third call center in Coeur d'Alene. The new Verizon LiveSource center, which currently is hiring 300 directory-assistance operators, is in the same building as Verizon's first call center—the National Open Market Center at 7400 Mineral Drive in Coeur d'Alene. In 2003, Verizon employed about 350 people in Kootenai County.
- Center Partners announced February 5 that it would reopen its Coeur d'Alene call center that it closed in December. Center Partners opened the Coeur d'Alene center in March 2001 and added a second call center in Post Falls in January 2002. By late 2002, it employed about 1,100 people at the two call centers in Kootenai County. After the closure of the Coeur d'Alene center, it still employed 400 people in Post Falls. In February, it began hiring 200 workers for the Coeur d'Alene center at 1201 West Ironwood Drive. The new workers will answer customer service questions, including billing issues and product use, for an unnamed telecommunications company.
- Just as one call center was added and one was restored in Coeur d'Alene, another call center announced it was closing. Dakota Direct announced plans to close its call center in downtown Coeur d'Alene in mid-March. About 95 people work for the call center. Dakota Direct offered all of the workers jobs at its call center in Spokane. Dakota opened the contract call center in January 1998, and its employment typically fluctuated between 120 and 180 workers.
- After the closure, Dakota's 9,700-square-foot building facing Lake Coeur d'Alene and the Coeur d'Alene Resort will be transformed into an upscale Asian restaurant. Hagadone Hospitality, owner of the resort, plans to open Bonsai Bistro featuring a bar, Japanese garden with a waterfall, pagoda roofline, and bonsai trees. When the 200-seat restaurant opens in June, it will employ 60 people.
- The Bonsai Bistro news was just one of the Hagadone Corp.'s three major announcements since the beginning of the year. In early January, Duane Hagadone announced the purchase of 38 acres on Blackwell Island where the Spokane River flows from Lake Coeur d'Alene. The purchase includes a 300-slip marina and 200 winter boat storage spaces. Hagadone already owns 900 boat slips on Lake Coeur d'Alene. The U.S. Bureau of Land Management owns 32 acres on the north end of the island. Blackwell Island RV Park also is located on the island.
- Hagadone Hospitality's largest announcement involved plans to build a hotel at its golf course on Lake Coeur d'Alene, and to develop apartments and townhouses along the golf course. The total cost of the five-phase project will be \$50 million to \$75 million. Construction of the hotel, which will have up to 200 rooms, will start in the spring of 2005. The Coeur d'Alene Resort, the premier hotel owned by Hagadone Hospitality on the other side of Tubbs Hill, has 340 rooms.
- When the Gateway Marina in Harrison reopens for the summer in April, it will sport a more elegant look and a new name—Foxfire Marina. Renovations to the business—which includes a marina, restaurant, bar, and convenience store—include a granite bar, stained glass partitions, marble walls, and hardwood floors. The marina is one of Harrison's largest private employers and the centerpiece of its tourism industry.
- All Seasons Apparel Inc., a garment-making concern owned by Mark Gantar, recently moved from the Spokane Industrial Park to Post Falls. One motivation was the rising Washington State minimum wage, which increased from \$7.01 to \$7.16 an hour January 1. Other motivating factors include lower costs of workers' compensation, land, and water. Another benefit of locating in Kootenai County is that the entire county is a HUBzone Empowerment area, where federal government contractors are given preference. Gantar is pursuing several government contracts that could allow All Season's to add up to 150 workers. Gantar brought a management team and 25 workers to Post Falls. Once in Idaho, the base wage was cut to \$5.50 an hour plus piece rate.
- In late 2003, Kootenai County was in danger of losing one of its larger corporate headquarters, Empire Airlines, which hauls freight primarily for Federal Express in 13 western states and British Columbia. It is located at 2115 Government Way

Continued on page 31



SEAPORT

NORTH CENTRAL IDAHO: CLEARWATER, IDAHO, LATAH, LEWIS, & NEZ PERCE COUNTIES

EMPLOYMENT TRENDS

Seaport's seasonally adjusted unemployment rate increased in December to 3.7 percent from November's rate of 4.0 percent, as shown in Seaport Table 1. In December 2002, the rate was 5.2 percent. The December decrease in *Total Employment* was unusual because December is traditionally a strong employment month. One of the reasons for the decrease was that holiday hiring lagged behind last year. Starting in October, area retail managers predicted a slow holiday season. Overall, they were right. Stores reported holiday sales in 2003 were down from 2002.

In December, Seaport's *Nonfarm Payroll Jobs* remained near the same level as November 2003, but decreased 1,130 from December 2002. Nearly all sectors contributed to the decreases.

SPECIAL TOPIC: Trade with Canada

The following facts describe, in part, Idaho's economic relationship with Canada, which is the United States' largest trading partner. Idaho had a \$130 million trading gap with Canada in 2002. Residents of Idaho visited Canada 142,000 times and spent \$38 million during the year, while Canadians made more than 211,000 visits to Idaho and spent \$26 million. Idaho's top export to Canada was computers, worth \$21 million. Canada's top export to Idaho was softwood lumber, worth \$87 million. Idaho exported \$46 million in live animals to Canada, which exported \$3 million in live animals to Idaho. Canada imported \$306 million in Idaho goods, while Idaho imported \$436 million in Canadian goods.

In other Canadian/Idaho economic news, the World Trade Organization (WTO) appeals panel in January gave a boost to the United States and Idaho when it reversed most of an earlier ruling that said U.S. special duties on Canadian lumber were illegal. The panel agreed with U.S. claims that lumber from state-owned lands in Canada can be unfairly subsidized if provincial gov-

Seaport Table 1: Labor Force & Employment
Nez Perce County, Idaho and Asotin County, Washington

	Dec 2003*	Nov 2003	Dec 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	35,060	35,500	34,790	-1.2	0.8
Unemployment	1,300	1,430	1,800	-9.1	-27.8
% of Labor Force Unemployed	3.7	4.0	5.2		
Total Employment	33,760	34,070	32,990	-0.9	2.3
Unadjusted					
Civilian Labor Force	35,190	35,340	34,820	-0.4	1.1
Unemployment	1,400	1,370	1,830	2.2	-23.5
% of Labor Force Unemployed	4.0	3.9	5.3		
Total Employment	33,790	33,970	32,990	-0.5	2.4
JOBS BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	26,180	26,270	27,310	-0.3	-4.1
Goods-Producing Industries	4,400	4,370	4,390	0.7	0.2
Natural Resources & Mining	190	180	240	5.6	-20.8
Construction	1,030	1,010	980	2.0	5.1
Manufacturing	3,180	3,180	3,170	0.0	0.3
Wood Product Manufacturing	560	560	550	0.0	1.8
Food Manufacturing	70	70	100	0.0	-30.0
Paper Manufacturing	1,190	1,190	1,180	0.0	0.8
Other Manufacturing	1,360	1,360	1,340	0.0	1.5
Service-Providing Industries	21,780	21,900	22,920	-0.5	-5.0
Trade, Transportation & Utilities	5,490	5,480	5,580	0.2	-1.6
Wholesale Trade	610	610	660	0.0	-7.6
Retail Trade	3,610	3,610	3,620	0.0	-0.3
Utilities	90	90	90	0.0	0.0
Transportation & Warehousing	1,180	1,170	1,210	0.9	-2.5
Information	350	350	400	0.0	-12.5
Financial Activities	1,570	1,580	1,850	-0.6	-15.1
Professional & Business Services	1,370	1,380	1,430	-0.7	-4.2
Education & Health Services	3,890	3,870	3,970	0.5	-2.0
Leisure & Hospitality	2,580	2,600	2,620	-0.8	-1.5
Other Services	950	950	1,100	0.0	-13.6
Government Education	2,370	2,370	2,440	0.0	-2.9
Government Administration	2,340	2,450	2,650	-4.5	-11.7
Government Tribes	870	870	880	0.0	-1.1

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

ernments sell the wood at below-market price; therefore, the United States has the right to impose extra duties to prevent lower-priced Canadian wood harming U.S. manufacturers. In 2002, the United States imported nearly \$6 billion of softwood lumber from Canada—about a third of the American market. Softwood lumber from pine, spruce, and other trees is a key product in home construction.

AREA DEVELOPMENTS

Clearwater County

- The Orofino City Council approved a request to write a grant application for money to extend the City of Orofino's infrastructure (water and sewer lines) to the property of a proposed Best Western

Motel site planned by Paul Pippenger of Orofino. The application would be submitted to the Idaho Department of Commerce. In addition to building a motel, the plan includes building a convention center, which Orofino currently lacks. One reason a Best Western franchise was chosen was because the chain could book up to 11 rooms per night from reservations made through the national system by people who might never register in the area otherwise. Many members of the council and audience said that a motel with a convention center would bring many groups and organizations to the area for meetings that would otherwise not be held in Orofino.

Idaho and Lewis Counties

- Two Idaho County "bit and spur makers" were featured in a book released nationally and internationally. **Bits & Spurs: Motifs, Techniques and Modern Makers**, written by Ned and Jody Martin, is a 303-page hardcover book which features the story of bit and spur makers in the United States. The book features short profiles on 123 contemporary makers and more than 900 photographs of their work. The two Idaho County businesses featured are Custom Bit and Spur, located in Stites, and Rags Bit and Spur of Grangeville.

Latah County

- Last year was a disappointing year for agriculture. Farmers in Latah County were especially hard hit. Garth Taylor, assistant professor of agriculture economics at the University of Idaho, said Idaho farmers saw profits drop in 2003. Farmers throughout Idaho produced 2.0 percent more product, but received 24 percent less profit last year. Producers sold \$4 billion worth of goods, but received only \$955 million in net farm income. Crops traditionally grown on the Palouse, including wheat, barley and pulse crops, were the least profitable in the state. Wheat declined 3.0 percent, while pulse crops—which include beans, peas, and lentils—dropped 33 percent in cash receipts. Southern Idaho growers had a better year than those on the Palouse. Sugar beets and onions—crops that are not easily grown locally—were profitable. Production of Idaho's famous potatoes, typically grown in the southern part of the state, dropped 23 percent. Cattle and milk made the most money with an entire livestock profit increase of 14 percent from 2002. In 2003 farmers were not only hit with reductions in crop prices, but fixed costs for farmers such as fuel, fertilizer, and equipment, skyrocketed.

Nez Perce and Asotin Counties

- Potlatch announced a layoff of up to 50 workers in the consumer products division at their Lewiston

plant. The decision to downsize is part of Potlatch's plan to control costs in a competitive market by streamlining production and expanding marketing, said Michael D. Sullivan, Potlatch's corporate spokesman in Spokane. "It isn't that we're selling less, necessarily, but the prices we are getting for the product are less than we want them to be and less than they have been," Sullivan said. "We anticipate this isn't a long-term problem. This is kind of a normal cycle that the industry goes through." But Potlatch has no intention of rehiring workers when conditions improve for the division, which makes paper towels, toilet paper, facial tissue, and paper napkins. The changes are not a sign that Potlatch is moving away from a strategy that focuses on consumer products or that the role Lewiston plays in the company is diminishing, Sullivan said. "All you have to do is look at the commitment and investment we have in Lewiston, which is huge," Sullivan said. "Obviously we're not going to walk away from that." Last year hourly employees in consumer products and pulp and paperboard took 3.0 percent wage cuts for about 19 months of a four-year agreement. Some workers lost vacation time. At the time of the negotiations, Potlatch had finished two losing years and was heading into a third; however, the company has turned profits in the two most recent quarters and its stock price is rising.

- The Nez Perce Tribe awarded more than \$200,000 in gaming revenue to area schools in January. "The tribe does not have infinite resources, but we recognize the importance of investing in local school children," said Anthony Johnson, Chairman of the Nez Perce Tribal Executive Committee. The grants, ranging from \$828 to \$15,000, were required by Proposition One, the initiative allowing gambling on tribal lands. Sixteen school districts in an area from Asotin to Potlatch and Kamiah to Riggins received money. As a condition of Proposition One, Idaho tribes must donate 5.0 percent of their net gaming revenue to schools. The Nez Perce Tribe gave about \$50,000 more than required.

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TREASURE VALLEY

ADA, ADAMS, BOISE, CANYON, ELMORE, GEM, OWYHEE, PAYETTE, VALLEY, & WASHINGTON COUNTIES

EMPLOYMENT TRENDS

The Boise City Metropolitan Statistical Area's (MSA) average annual unemployment rate for December 2003 was 4.5 percent as shown in Treasure Valley Table 1. This was three-tenths of a percentage point below the November 2003 rate of 4.8 percent and a full percentage point below the December 2002 rate of 5.5 percent. Month-over-month, the number of employed persons increased by 400, or 0.2 percent, from November 2003, and the number of unemployed individuals decreased by 700, or 5.9 percent. The increasing number of persons employed and the decreasing number of persons unemployed created an overall decrease of 300 individuals, or 0.1 percent, in the *Civilian Labor Force* from November 2003. Year-over-year, the number of employed persons decreased by 1,100, or 0.5 percent, and the number of unemployed individuals decreased by 2,700 individuals or 19.6 percent, creating a net decrease in the *Civilian Labor Force* of 3,800 individuals, or 1.5 percent, in the *Civilian Labor Force* from December 2002. The *Civilian Labor Force* figures for December 2003 for all ten counties in Southwest Idaho are shown in Treasure Valley Table 2.

**Treasure Valley Table 2: December 2003
Seasonally Adjusted Labor Force Figures for
Southwest Idaho Counties**

	Civilian Labor Force	Number Unem- ployed	Percent Unem- ployed	Number Employed
Ada	176,226	6,513	3.7	169,714
Adams	1,835	337	18.4	1,498
Boise	2,526	168	6.7	2,358
Canyon	69,737	4,539	6.5	65,198
Elmore	9,453	487	5.1	8,967
Gem	5,664	350	6.2	5,315
Owyhee	4,432	80	1.8	4,352
Payette	9,424	690	7.3	8,734
Valley	3,802	301	7.9	3,501
Washington	4,154	361	8.7	3,793
Statewide	685,576	32,766	4.8	652,810

**Treasure Valley Table 1: Boise MSA Labor Force & Employment
Ada and Canyon Counties**

	Dec 2003*	Nov 2003	Dec 2002	% Change Last Month	% Change Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
Seasonally Adjusted					
Civilian Labor Force	246,000	246,300	249,800	-0.1	-1.5
Unemployment	11,100	11,800	13,800	-5.9	-19.6
% of Labor Force Unemployed	4.5	4.8	5.5		
Total Employment	234,900	234,500	236,000	0.2	-0.5
Unadjusted					
Civilian Labor Force	245,400	247,000	250,000	-0.6	-1.8
Unemployment	11,300	11,600	14,200	-2.6	-20.4
% of Labor Force Unemployed	4.6	4.7	5.7		
Total Employment	234,100	235,400	235,800	-0.6	-0.7
JOB BY PLACE OF WORK					
Nonfarm Payroll Jobs**	232,700	232,700	229,500	0.0	1.4
GOODS-PRODUCING INDUSTRIES	45,200	45,600	46,500	-0.9	-2.8
Natural Resources & Construction	15,200	15,700	15,500	-3.2	-1.9
Manufacturing	30,000	29,900	31,000	0.3	-3.2
Durable Goods	23,100	23,000	24,100	0.4	-4.1
Wood Product Manufacturing	1,600	1,700	1,900	-5.9	-15.8
Fabricated Metal Products Mfg.	1,300	1,300	1,400	0.0	-7.1
Machinery Manufacturing	1,200	1,200	1,200	0.0	0.0
Computer & Electronic Manufacturing	14,500	14,400	15,300	0.7	-5.2
Transportation Equipment Mfg.	1,600	1,600	1,500	0.0	6.7
Other Durable Goods	2,900	2,800	2,800	3.6	3.6
Nondurable Goods	6,900	6,900	6,900	0.0	0.0
Food Manufacturing	5,400	5,300	5,300	1.9	1.9
Printing & Related Support Activities	700	700	700	0.0	0.0
Other Nondurable Goods	800	900	900	-11.1	-11.1
SERVICE-PROVIDING INDUSTRIES	187,500	187,100	183,000	0.2	2.5
Trade, Transportation, & Utilities	46,200	46,100	45,400	0.2	1.8
Trade	39,200	39,100	38,500	0.3	1.8
Wholesale Trade	10,600	10,700	10,200	-0.9	3.9
Wholesalers, Durable Goods	6,600	6,600	6,400	0.0	3.1
Wholesalers, Nondurable Goods	3,000	2,900	2,900	3.4	3.4
Retail Trade	28,600	28,400	28,300	0.7	1.1
Food & Beverage Stores	4,000	4,100	4,400	-2.4	-9.1
General Merchandise Stores	6,600	6,600	6,400	0.0	3.1
All Other Retail Trade	18,000	17,700	17,500	1.7	2.9
Transportation, Warehousing, & Utilities	7,000	7,000	6,900	0.0	1.4
Utilities	600	600	700	0.0	-14.3
Transportation & Warehousing	6,400	6,400	6,200	0.0	3.2
Information	3,700	3,700	3,600	0.0	2.8
Telecommunications	1,400	1,400	1,400	0.0	0.0
Financial Activities	12,400	12,400	12,200	0.0	1.6
Finance & Insurance	9,400	9,400	9,000	0.0	4.4
Real Estate & Rental & Leasing	3,000	3,000	3,200	0.0	-6.3
Professional & Business Services	33,800	33,700	31,400	0.3	7.6
Professional, Scientific, & Technical	9,400	9,400	10,000	0.0	-6.0
Management of Companies & Ent.	6,700	6,700	6,700	0.0	0.0
Administrative & Support & Waste Mgmt.	17,700	17,600	14,700	0.6	20.4
Educational & Health Services	28,700	28,600	27,200	0.3	5.5
Educational Services	2,500	2,500	2,000	0.0	25.0
Health Care & Social Assistance	26,200	26,100	25,200	0.4	4.0
Hospitals	9,200	9,200	9,000	0.0	2.2
Leisure & Hospitality	19,700	19,600	19,700	0.5	0.0
Arts, Entertainment, & Recreation	2,700	2,700	2,300	0.0	17.4
Accommodation & Food Services	17,000	16,900	17,400	0.6	-2.3
Accommodation	2,000	1,900	2,000	5.3	0.0
Food Services & Drinking Places	15,000	15,000	15,400	0.0	-2.6
Other Services	6,800	6,800	6,700	0.0	1.5
Total Government	36,200	36,200	36,800	0.0	-1.6
Federal Government	5,300	5,200	5,500	1.9	-3.6
State & Local Government	30,900	31,000	31,300	-0.3	-1.3
State Government	13,900	14,000	13,900	-0.7	0.0
State Government Education	4,200	4,300	4,500	-2.3	-6.7
State Government Administration	9,700	9,700	9,400	0.0	3.2
Local Government	17,000	17,000	17,400	0.0	-2.3
Local Government Education	9,800	9,800	10,100	0.0	-3.0
Local Government Administration	7,200	7,200	7,300	0.0	-1.4

* Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

In the Boise City MSA *Nonfarm Payroll Jobs* remained unchanged at 232,700 in December 2003 while year-over-year, *Nonfarm Payroll Jobs* experienced a gain of 3,200 jobs, or 1.4 percent. Month-over-month, *Goods-Producing Industries* lost 400 jobs with decreases noted in *Natural Resources, Mining & Construction* (-500 jobs), *Wood Product Manufacturing* (-100 jobs), and *Other Nondurable Goods Manufacturing* (-100 jobs) while job gains were noted in *Computer & Electronic Products Manufacturing* (100 jobs) and *Other Durable Goods Manufacturing* (100 jobs). Year-over-year, *Goods-Producing Industries* lost 1,300 jobs with job decreases noted in *Natural Resources, Mining, & Construction* (-300 jobs), *Wood Product Manufacturing* (-300 jobs), *Fabricated Metal Products Manufacturing* (-100 jobs), *Computer & Electronic Product Manufacturing* (-800 jobs), and *Other Nondurable Goods Manufacturing* (-100 jobs) while job gains were noted in *Transportation Equipment Manufacturing* (100 jobs), *Other Durable Goods Manufacturing* (100 jobs), and *Food Manufacturing* (100 jobs).

In *Service-Providing Industries*, jobs gained outweighed jobs lost by 400 in the Boise City MSA from November to December 2003. Job gains were experienced in *Nondurable Goods Wholesale Trade* (100 jobs), *All Other Retail Trade* (300 jobs), *Administrative & Support & Waste Management Services* (100 jobs), *Health Care & Social Assistance Services* (100 jobs), *Accommodation Services* (100 jobs), and *Federal Government* (100 jobs). Job losses occurred in *Food & Beverage Stores* (-100 jobs) and *State Government Education* (-100 jobs). Year-over-year, *Service-Providing Industries* gained 4,500 jobs, or increased 2.5 percent. Job gains were noted in *Durable Goods Wholesale Trade* (200 jobs), *Nondurable Goods Wholesale Trade* (100 jobs), *General Merchandise Stores* (200 jobs), *All Other Retail Trade* (500 jobs), *Transportation & Warehousing Services* (200 jobs), *Information Services* (100 jobs), *Finance & Insurance Services* (400 jobs), *Administrative & Support & Waste Management Services* (3,000 jobs), *Educational Services* (500 jobs), *Health Care & Social Assistance Services* (1,000 jobs) including *Hospitals* (200 jobs), *Arts, Entertainment, & Recreation Services* (400 jobs), *Other Services* (100 jobs), and *State Government Administration* (300 jobs). Job losses were noted in *Food and Beverage Stores* (-400 jobs), *Utilities Services* (-100 jobs), *Real Estate & Rental & Leasing Services* (-200 jobs), *Professional, Scientific, & Technical Services* (-600 jobs), *Food Services & Drinking Places* (-400 jobs), *Federal Government* (-200 jobs), *State Government Education* (-300 jobs), *Local Government Education* (-300 jobs), and *Local Government Administration* (-100 jobs).

AREA DEVELOPMENTS

Boise City MSA

- The Buy Idaho exhibition featured 100 exhibitors at its annual event at the Idaho Statehouse in mid-

January. The annual event is sponsored by Buy Idaho, a non-profit business and industry association, and is a forum where member businesses can display and discuss their products and services in addition to networking with other Idaho businesses. Buy Idaho promotes Idaho business and industry by urging group members and the public to purchase Idaho products and services in an effort to keep jobs and tax revenues in Idaho. For more information, please visit the Buy Idaho website at www.buyidaho.org.

- The 13th annual Idaho Business and Technology Expo, held in late January in Boise, featured more than 80 companies. Exhibitor participation was up from 2003; event organizers cited increased optimism about the economy as one of the reasons more exhibitors participated in the event. People who attended the Expo had an opportunity to find basic information about various businesses as well as new trends and products in the market.
- Washington Group International (WGI) announced that it was awarded a \$1.5 billion contract over the next five years for work in Iraq, Central Asia, North Africa, and several other areas. WGI, partnered with Black & Veatch Corporation of Kansas, will provide design, engineering, and construction services to the Transatlantic Programs Center of the U.S. Army Corps of Engineers. WGI was also awarded a \$105 million contract from Metallica Resources Inc. to provide site development services and contract mining for the Cerro San Pedro gold/silver mine in Central Mexico.
- A 66,233-square-foot six-story office building is planned for the northwest corner of Broad and Fourth streets in downtown Boise. The building will include a single-level underground parking structure. A second building is also planned for the vacant lot, which is currently used for parking. Construction is scheduled to begin in late spring and should be finished in approximately 10 months. The first building will house a law office, and has an additional 56,000-square feet of available office space. The second building, which includes plans for a retail portion, will be developed in the future.
- Work has already started on the Marketplace at Bown Crossing, a 35-acre mixed-use development between ParkCenter Boulevard and Boise Avenue in southeast Boise. Construction has started on the 59,000-square feet of commercial buildings and residential lofts. The Marketplace will include 20,000-square feet of specialty retail space, 11,000-square feet for residential use, 12,000-square feet of

professional office space, and 11 residential loft units. No completion date for this project was available by publication.

- Best Bath Systems, currently operating a 53,000-square-foot facility near the Boise airport, announced plans to build a new 70,000-square-foot manufacturing plant and headquarters in Kuna over the next few years. The first phase of construction is scheduled to begin this spring; the new Best Bath Systems facility is scheduled for completion in Fall 2006.
- T-Mobile started construction on a new customer service center in the SilverStone Corporate Center on Eagle Road in Meridian. The 77,000-square-foot center could employ at least 600 full-time employees who will handle incoming customer service calls. All jobs at T-Mobile will be full-time jobs with benefits, and the pay will start between \$9.50 and \$11.00 per hour. The company plans to hire and train between 100 and 150 customer service representatives in spring 2004, to open the service center during summer 2004, and hire additional employees for its full staff in December 2005. The annual payroll from the T-Mobile facility in Meridian is expected to be \$17 million when it is fully staffed. Economic benefits of the new jobs created will translate into much more throughout the area as employees spend their wages on housing, products, and services. The multiplier is estimated at 2.05 times, which means that when the business has filled all 600 jobs in Meridian, the economy will benefit by as much as \$35.97 million per year.
- Home Depot opened its latest Treasure Valley retail outlet in Eagle in mid-January. The 120,000-square-foot Eagle Home Depot is located at the corner of State Street and Idaho 55. The store employs 120 full- and part-time employees. Bank of America and T.G.I. Fridays will build facilities at the site; WinCo also has plans to build a store on the site, but not until 2005 or 2006.
- Costco announced plans to open a new 146,000-square-foot retail outlet in Nampa in 2006. The store will anchor a new 75-acre retail center north of Interstate 84 and Karcher Road. The retail center will include more than 700,000-square feet of building space that will include three other large retail buildings, a mid-sized retail building, and 10 smaller shop and restaurant structures. The retail center is scheduled to open in the summer/fall of 2006 when the Karcher Road interchange at I-84 will be completed.
- Swift & Co. announced plans in mid-January to cut 25 positions at its processing plant in Nampa. The job cuts are part of the 270 positions that the company would eliminate nationally as a reaction to import restrictions on beef after it was discovered that a dairy cow in Washington was infected with mad cow disease. The Nampa Swift & Co. plant is hoping to make the job cuts through attrition instead of layoffs. The company currently employs 560 people at the Nampa facility and 17,000 nationally.
- Treasure Valley Transit announced plans in January to include a shuttle service to run along the Nampa-Caldwell Boulevard every half-hour, which will connect the two cities. The new service will mean more efficiency and less travel time for some users.
- The Neon Plaza, a retail shopping center located at the site of the former Neon Drive-In (next to Lowe's across from Karcher Mall), opened with its first tenant, Primo's Pizza. Other retail outlets planning to open in the shopping center in the near future include Quiznos, Fantastic Sams, Cold Stone Creamery, and Mountain State Cellular.
- In other recent business openings in the Boise City MSA: Sonshine Family Health Clinic opened on North Cole Road in Boise; Rampage Gaming, a new venue for video gaming opened in the Northview Shopping Center in Meridian; Eagle Rib Shack opened on State Street in downtown Eagle; Platt Electric Supply opened on 6th Street in north Nampa; and Home Federal opened a new branch on the corner of 10th Avenue and Dearborn in Caldwell.
- Other recent business happenings in the Boise City MSA includes the following: the Veltex multiple use building at the corner of Main and 5th Streets in downtown Boise finished construction in January; KB Toys announced the closure of its Boise Towne Square mall location following the company's bankruptcy announcement; Coldwater Creek closed its outlet store in the Boise Factory Outlets mall as a result of shifting its strategy to operate full-line retail stores; Baja Fresh announced plans to open a new eatery on Broadway Avenue near Boise State University in Boise; Sage Health Care announced plans to occupy a new building on Allumbaugh Street in Boise; Pinnacle Engineers announced plans to build a second office and warehouse building near its current facility on Executive Drive in Boise; Easy Cookin' moved from the Boise Towne Square mall to a new

location in Overland Park shopping center in Boise; Bank of America announced plans to build a new branch in the Family Center shopping center on Federal Way in southeast Boise; Starbucks Coffee announced plans to open its tenth Treasure Valley outlet in the Eastgate Shopping Center at the corner of Boise Avenue and Apple Street in southeast Boise; Idaho Athletic Club purchased Total Woman Fitness and its building on 15th Street in downtown Boise; Garden City held a groundbreaking celebration for its new City Hall that will be built on Glenwood Street; Hastings leased a building planned in the Fairview Lakes development on East Fairview in Meridian; State Farm Mutual Auto Insurance leased space in Brighton Plaza on Explorer Drive in west Boise and is scheduled to open an office there in April; Western Windows moved to Nampa in mid-January; Cold Stone Creamery announced plans to open a new outlet in March near Lowe's on Caldwell Boulevard in Nampa; King Menus announced plans to move into a new \$3 million plant in Nampa this year; and Family Medical Center held a groundbreaking ceremony for its building near West Valley Medical Center in Caldwell.

Elmore County

- Idaho Power recently received approval from the Idaho Public Utilities Commission to develop a 160-megawatt, natural gas-fired power plant in Mountain Home. Mountain View Power will build the \$54 million plant and Idaho Power will assume possession when the plant is completed in 2005.
- Cold Springs Winery is scheduled to open in April. Bill and Bing Ringert, owners of the winery, plan to open if the chardonnay is ready for bottling. Grape varieties including riesling, chardonnay, viognier, cabernet sauvignon, merlot, syrah, and pinot noir were grown on a 12-acre plot of land just north of Hammett. The ultimate goal of the winery is to produce 10,000 cases of wine annually; this year's goal is to produce 600 cases.

Payette County

- Payette Chamber of Commerce recognized Partners Produce and T.I.P.S. as the Agribusiness of the Year and Business of the Year, respectively, at its annual awards banquet in early-January. Partners Produce harvests 500 to 550 acres of onions and contracts or buys the rest of its product, and nearly all of its staff works year-round either harvesting in the field or in the plant. T.I.P.S. is a restaurant that supports many community activities and is used as the meeting place for many activities, including the Payette Chamber of Commerce.

Valley County

- The McCall Winter Carnival was held in late January and early February. Large crowds attended the ten-day event that featured the annual Mardi Gras grand parade, Monte Carlo casino night, Starlight Masquerade Ball, stage performances, snow sculptures, music, a food court, a pancake breakfast, hockey demos, dances, plays, dog pulls, ATV races, snow sculpting contests, bingo contests, snow shoe golf, best beard contest, ladies' hairy leg contest, carnival ice show, family spaghetti dinner, winter wine tasting and auction, a fun run, figure skating exhibitions, and cross country skiing. Area restaurants, stores, and lodging establishments benefited from the influx of tourists in McCall for the annual event.
- Tamarack Resort sold out of its initial offering of 104 custom homes and lots, which generated \$46 million for the resort. Idaho residents took the majority of the homes/sites, grabbing 38 percent of the initial offering while residents of other states and countries took the remaining sites. More sites are planned to be offered in the near future. Synthesis Realty Group, a real estate consulting firm hired by Tamarack developers called this initial offering the "largest resort site launch ever in North America."

Washington County

- In early January, Weiser senior citizens held an open house to show the public their plans to build a new Senior Center on the corner of East Main and East Second Street. Groundbreaking for the project is scheduled for some time this spring and the entire project is scheduled for completion in the summer of 2005. The current Senior Center building will remain open during the construction of the new building. The construction will be done in several phases, and when the building is completed, the old Senior Center building will be torn down and the space converted to a parking lot.

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MAGIC VALLEY

BLAINE, CAMAS, CASSIA, GOODING, JEROME, LINCOLN, MINIDOKA, & TWIN FALLS COUNTIES

EMPLOYMENT TRENDS

The seasonally adjusted unemployment rate was 3.7 percent in December 2003 for the Magic Valley Labor Market Area (LMA) as seen on Magic Valley Table 1. This is three-tenths of a percentage point lower than November 2003, and five-tenths of a percentage point lower than December 2002. Year-over-year *Civilian Labor Force* increased by 5,270 workers or 10.4 percent, whereas actual numbers of unemployed workers dropped by 90, or decreased by 4.2 percent. This is significant because in other parts of the state, workers have become discouraged and dropped out of the *Civilian Labor Force* as their unemployment benefits ran out and prospects were limited. The opposite seems to be happening in the Magic Valley LMA. Workers are optimistic as new jobs are being created, and prospects for employment are excellent.

Nonfarm Payroll Jobs increased by 4,510 year-over year, a jump of 11.2 percent. Most jobs that were created were in the service and retail sectors, but there was also significant expansion in *Construction*. The City of Twin Falls shattered the previous year's number of new housing starts, which boosted construction jobs in the fall and bodes well for the first part of 2004. There were also many heavy construction projects in Twin Falls with new stores built on the canyon rim and the continuing construction on the new Renaissance Park on North College Road.

Sectors that showed large increases were *Construction* and *Retail* at 18.5 percent and 6.3 percent, respectively. *Food Manufacturing* and *Wood Product Manufacturing* sectors declined 4.6 percent and 17.1 percent, respectively. *Wood Product Manufacturing* employers tended to not replace employees that

Magic Valley Table 1: Labor Force & Employment
Twin Falls, Jerome, and Gooding Counties

	Dec 2003*	Nov 2003	Dec 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	55,870	55,700	50,600	0.3	10.4
Unemployment	2,060	2,210	2,150	-6.8	-4.2
% of Labor Force Unemployed	3.7	4.0	4.2		
Total Employment	53,810	53,490	48,450	0.6	11.1
<i>Unadjusted</i>					
Civilian Labor Force	55,850	55,940	50,770	-0.2	10.0
Unemployment	2,240	2,110	1,990	6.2	12.6
% of Labor Force Unemployed	4.0	3.8	3.9		
Total Employment	53,610	53,830	48,780	-0.4	9.9
JOB BY PLACE OF WORK					
Nonfarm Payroll Jobs**	44,920	43,860	40,410	2.4	11.2
<i>Goods-Providing Industries</i>	7,760	7,730	7,850	0.4	-1.1
Natural Resources & Mining	20	20	20	0.0	0.0
Construction	2,630	2,410	2,220	9.1	18.5
Manufacturing	5,110	5,300	5,610	-3.6	-8.9
Food Manufacturing	3,510	3,440	3,680	2.0	-4.6
Other Manufacturing	1,600	1,860	1,930	-14.0	-17.1
<i>Service-Providing Industries</i>	37,160	36,130	32,560	2.9	14.1
Trade, Transportation & Utilities	9,950	10,170	9,830	-2.2	1.2
Wholesale Trade	1,940	1,870	1,850	3.7	4.9
Retail Trade	6,200	6,310	5,830	-1.7	6.3
Utilities	270	250	210	8.0	28.6
Transportation & Warehousing	1,540	1,740	1,940	-11.5	-20.6
Information	490	500	500	-2.0	-2.0
Financial Activities	1,790	1,740	1,680	2.9	6.5
Professional & Business Services	7,130	6,410	5,170	11.2	37.9
Educational & Health Services	3,820	3,660	3,070	4.4	24.4
Leisure & Hospitality	3,830	3,620	3,660	5.8	4.6
Other Services	1,500	1,520	1,490	-1.3	0.7
Government Education	4,060	4,000	3,030	1.5	34.0
Government Administration	4,590	4,510	4,130	1.8	11.1

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

were lost to attrition, which kept workforces a little lower. *Food Processing* employment was lower as many companies experienced some attrition and also hired seasonal help later than usual.

For all of 2003, the Magic Valley LMA economy continued to markedly resist recessionary economic trends that still plagued much of the state and the nation. Signs of recovery are present now in state and national economies, and the Magic Valley is well poised to be a state leader. However, it is expected that the Magic Valley will experience a stabilization period and will perhaps see some small increases in unemployment as the economy adjusts after precipitous growth. Significant new job creation is not expected, but the positive trend should remain. One area of concern is that many of the newly created service and retail sector jobs are relatively low paying and lack benefits. This contributes



EMPLOYMENT SURVEY RESULTS REPORTED

Education is most important to employers who are hiring people for occupations where licensing and certification are required, but when a worker is being considered for a promotion, interpersonal skills are deemed the most important, according to results of an employee survey of South Central Idaho employers released in January, **Employer Survey: Assessing Applicant Characteristics.**

For semi-skilled and unskilled labor positions, employers considered interpersonal skills to be most important when recruiting new employees and for determining promotions. Greg Rogers, the Magic Valley regional labor

economist for the Idaho Department of Labor, conducted, analyzed, and presented the result of this large survey project to the South Central Idaho Works! Board. The project, funded by a grant in partnership with the College of Southern Idaho, the Idaho Department of Labor, and the South Central Idaho Works! Board, was aimed at determining the type of training and characteristics employers want in new hires and in those workers considered for promotion. Out of 995 surveys sent to every type of business in South Central Idaho, more than 300 were returned from every county in the region. Eight different employment sectors were represented by the survey. To see the report on-line, go to www.jobservice.ws, click on "Area LMI" and select South Central Idaho.

to some socioeconomic challenges and many families must have more than one worker in the family or family members must work multiple jobs. Concerns in the agriculture sector include the closure of the J.R. Simplot Plant in Heyburn, which has increased the possibility that fewer potato contracts will be available for farmers. The discovery of mad cow disease in the Northwest has thrown the U.S. beef market into decline as exports have dried up and consumers have been cautious about eating red meat. On the other hand, this could be beneficial to the pork, lamb, and trout markets. Also on the positive side is that the water year appears to be adequate for irrigation in 2004 in South Central Idaho.

AREA DEVELOPMENTS

Twin Falls County

- Several business and civic leaders from across the Magic Valley attended a Director's Forum at the Herrett's Center of the College of Southern Idaho in early February, led by Roger Madsen, Director of the Idaho Department of Labor and Interim Director of the Idaho Department of Commerce. In addition to praising the positive achievements of South Central Idaho in both unemployment rate and job growth, Madsen also outlined the merger of the Idaho Departments of Labor and Commerce. This was followed by a question and answer session involving shared ideas and thoughts among the private sector and public employee participants. The Magic Valley regional labor economist and the Mini-Cassia and Magic Valley Job Services management teams also attended. This forum is one of several Directors Forums Madsen is presenting across the state.

- Madsen also was one of the featured speakers at the D.L. Evans Economic Symposium in Jerome in early February. Madsen complimented the bank for 100 years of tremendous integrity and customer service, giving credit to former Governor John Evans for his contribution to the state of Idaho and his family's outstanding leadership of D. L. Evans Bank. In addition, Madsen pledged support for business from the Idaho Departments of Commerce and Labor for the Magic Valley continued economic strength.
- The City of Twin Falls will soon be changing the names of many downtown streets to alleviate confusion. The downtown's numbered streets and avenues have been difficult for people to find and many directional designations (north, south, east, and west) do not seem to correspond to true compass directions in some cases. The new street names will reflect the names of local small cities located close to Twin Falls. The new signage is expected to be complete by April 1, 2004

Blaine, Camas, Gooding, Jerome, and Lincoln Counties

- Blockbuster Video opened a new store at 111 North Main Street in Hailey in early December. The store is open from 10:00 a.m. to midnight seven days a week, and offers three-evening and five-evening rentals as well as a frequent rental program called "Rewards." Blockbuster hired a store manager and 14 associates from the Hailey area.
- Optician Tom McDonough of Jerome opened Lifetime Optical, a new optical center, on the cor-

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SOUTHEAST IDAHO

BANNOCK, BEAR LAKE, BINGHAM, CARIBOU, FRANKLIN, ONEIDA, & POWER COUNTIES

EMPLOYMENT TRENDS

Holiday activity and winter recreation in December drove the Pocatello Metropolitan Statistical Area's (MSA) seasonally adjusted unemployment rate down three-tenths of a percentage point to 4.5 percent from November's revised rate of 4.8 percent. The number of individuals employed in December increased by 100 to total 38,280 while the number of unemployed individuals decreased by 120 to 1,800. The Pocatello MSA's unemployment rate remained below the state's rate of 4.8 percent and the U.S. rate of 5.7 percent.

The December 2003 unemployment rate fell 1.4 percentage points from December 2002 when it was 5.9 percent. In December 2002, the state and U.S. unemployment rates were equal at 6.1 percent.

The number of *Nonfarm Payroll Jobs* fell by 420 to 33,470 in December 2003 from November 2003 when it was 33,890. Job reductions in *Construction* and *Government Education* contributed to most of the reductions, which are usual for this time of year, but job losses occurred throughout most industries. The *Goods-Producing Industries* lost 160 jobs over the month. *Construction* lost 150 jobs and *Manufacturing* lost 10 jobs. Cold weather and school closures for the holiday contributed to the job reductions. The *Service-Providing Industries* lost 260 jobs over the month. *Government Education* led job losses, but several industries suffered job reductions as cold weather reduced the need for temporary workers and tourism slowed the need for workers in *Leisure & Hospitality*. From December 2002 to December 2003, *Nonfarm Payroll Jobs* fell by 140. The *Goods-Producing Industries* lost 440 jobs and the losses were equally split between *Construction* (-230) and *Manufacturing* (-210). The *Service-Providing Industries* gained jobs over the year. Most job gains occurred in *Financial Activities* (90), *Professional & Business Services* (150), and *Government Education* (210).

Southeast Idaho Table 1: Labor Force & Employment
Pocatello City MSA (Bannock County)

	Dec 2003*	Nov 2003	Dec 2002	% Change From	
				Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	40,080	40,100	38,470	0.0	4.2
Unemployment	1,800	1,920	2,270	-6.3	-20.7
% of Labor Force Unemployed	4.5	4.8	5.9		
Total Employment	38,280	38,180	36,200	0.3	5.7
<i>Unadjusted</i>					
Civilian Labor Force	40,030	40,720	39,060	-1.7	2.5
Unemployment	1,900	1,900	2,360	0.0	-19.5
% of Labor Force Unemployed	4.7	4.7	6.0		
Total Employment	38,130	38,820	36,700	-1.8	3.9
JOB BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	33,470	33,890	33,610	-1.2	-0.4
<i>Goods-Producing Industries</i>	3,920	4,080	4,360	-3.9	-10.1
Natural Resources & Mining	10	10	10	0.0	0.0
Construction	1,430	1,580	1,660	-9.5	-13.9
Manufacturing	2,480	2,490	2,690	-0.4	-7.8
Food Manufacturing	410	410	430	0.0	-4.7
Fabricated Metal Product Manufacturing	110	110	140	0.0	-21.4
Machinery Manufacturing	30	30	40	0.0	-25.0
Other Manufacturing	1,930	1,940	2,080	-0.5	-7.2
<i>Service-Providing Industries</i>	29,550	29,810	29,250	-0.9	1.0
Trade, Transportation & Utilities	6,890	6,890	6,850	0.0	0.6
Wholesale Trade	1,040	1,050	1,030	-1.0	1.0
Retail Trade	4,570	4,540	4,520	0.7	1.1
Utilities	40	40	50	0.0	-20.0
Transportation & Warehousing	1,240	1,260	1,250	-1.6	-0.8
Information	660	650	680	1.5	-2.9
Financial Activities	1,850	1,890	1,760	-2.1	5.1
Professional & Business Services	3,390	3,420	3,240	-0.9	4.6
Educational & Health Services	2,690	2,700	2,680	-0.4	0.4
Leisure & Hospitality	3,310	3,370	3,310	-1.8	0.0
Other Services	950	960	1,240	-1.0	-23.4
Government Education	5,540	5,700	5,330	-2.8	3.9
Government Administration	4,280	4,230	4,160	1.2	2.9

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

AREA ECONOMIC DEVELOPMENTS

Please note: Information contained in *Economic Developments* is obtained from area newspapers, local Job Service offices, trade publications, local area Chambers of Commerce publications, and other sources.

Several projects throughout Southeast Idaho were approved for funding through the Omnibus Appropriations Act, which the U.S. Congress approved in January. Projects range from tourism to healthcare and total nearly \$10 million. The projects are partially funded by the Omnibus Appropriations Act, and communities and/or organizations must provide the majority of the funding through other sources. The projects that received funding through the act include:

- Pioneer Historic Byway interpretive signs and kiosks in Bear Lake and Caribou Counties.
- Virtual history museum at the Idaho State University Museum of Natural History.
- Restoration of the Oneida Stake Academy in Preston.
- The L.E. and Thelma Stevens Performing Arts Center at Idaho State University.
- Cheyenne Connector, groundwater protection, and the urban transit system in Pocatello.
- The Idaho Telehealth Program, a program to improve healthcare in rural communities and to provide continuing education for healthcare providers.
- Bear Lake Memorial Hospital's skilled nursing center upgrade in Montpelier.
- Portneuf Medical Center's heart and vascular program in Pocatello.

Bannock County

- Demolition has begun for a new retail development near the Pine Ridge Mall on Yellowstone Avenue in Pocatello. The Pine Ridge Inn and Restaurant and a former Chevron Gas Station are being demolished to allow for the development. A Walgreens Drug Store will be built in the new shopping complex. Developers have not disclosed the identities of the other businesses to be located at the center, but they include a major retailer, a fast-food restaurant, and other small businesses. The former business at that location, the Pine Ridge Inn and Restaurant, employed 48 people. The new shopping complex is expected to employ nearly 200 people.
- Three Pocatello businesses recently closed and eliminated approximately 60 jobs: Albertsons Food Store on Yellowstone and Alameda, B-Side Skating Store, and King's Way Christian Books and Gift Store on Yellowstone.

Bear Lake County

- The Bear Lake Hospital Auxiliary Thrift Store in Montpelier held an open house at its new location. The store, now located at in the Lamarel building, provides more space to better display merchandise and has separate space for youth and children's clothing.
- A \$3.1 million upgrade is planned for Bear Lake Memorial Hospital's skilled nursing center. The upgrade is projected to begin in spring 2005, but is dependent on securing funding for the project. The hospital auxiliary has provided nearly \$500,000 toward the project, which also received \$400,000 through the Omnibus Appropriations Act.

Bingham County

- A new business area in Firth, The Firth Town Square, has begun housing businesses. The Blackfoot Medical Center located a satellite office at the

square, which provides medical service to the community. Three other businesses that will be housed at the new town square include the Alona King Optometrist Office, the City of Firth, and a 24-hour U Copy. There is space available for expansion.

- Sandy Empey and Peggy Lawver opened a café in Rockford, Rockford Row's End Café. The café provides fresh baked rolls, cookies, and desserts daily. In addition the owners also provide catering for special occasions and other items such as frozen meals and sack lunches.

Caribou County

- Soda Springs hosted the Rocky Mountain Snowmobile Hillclimb Association's race at Wood Canyon. More than 500 racers participated in the event. The annual event boosts the area and surrounding area's economy as racers and fans fill hotel rooms and restaurants, and shop at local specialty shops.

Franklin County

- Construction continues on the restoration of the Oneida Stake Academy. Work has begun on the footings and the foundation. Funding through the Omnibus Appropriations Act has been approved to assist with the restoration.

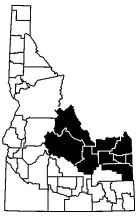
Oneida County

- Magic Mania opened in downtown Malad. The new business at 34 South Main in Malad sells magic trick supplies, gag items, and caters special events, parties, and meetings. Owners Ferris and Renae Larsen also perform magic shows.

Power County

- Four new businesses opened recently in American Falls: Ghost Town Gifts and Collectibles, Body Flex, Minuteman Cash, and Freddie's Roadhouse.
- Ghost Town Gifts is located on Idaho Street in American Falls. The building has been remodeled to accommodate the business, which offers collectible figurines, clocks, swords, Native American work, and nautical decorations. The business hopes to expand its inventory to include CDs, clothing, and jewelry.
- Freddie's Roadhouse lounge opened in downtown American Falls. Owner Fred Roads, along with friends and family, spent approximately a year remodeling for the business' opening. The lounge caters to veterans, bikers, and American Legion members.

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NORTHEAST IDAHO

BONNEVILLE, BUTTE, CLARK, CUSTER, FREMONT, JEFFERSON, LEMHI, MADISON, & TETON COUNTIES

EMPLOYMENT TRENDS

The seasonally-adjusted unemployment rate for the Bonneville Labor Market Area (LMA) decreased two-tenths of a percentage point from November to December 2003 and decreased four-tenths of a percentage point from December 2002 as seen in Northeast Table 1. Three of the counties in the LMA showed unemployment rate decreases over the month with the exception of Jefferson County, which remained unchanged. Year-over-year, all counties in the LMA experience rate decreases; Bingham County showed the largest decrease at nine-tenths of a percentage point. The unemployment rate for Idaho Falls, the largest city in the LMA, was 3.6 percent, a decrease of two-tenths of a percentage point month-over-month and three-tenths of a percentage point decrease from December 2002.

Of the remaining six counties not included in the LMA, Lemhi, Madison, and Teton Counties showed decreases over the month, Fremont remained unchanged, and the rate in both Clark and Custer Counties increased. All changes were less than 1.0 percentage point. Year-over-year, the unemployment rate in five counties showed decreases. Custer County showed the largest decrease at 2.0 percentage points while Lemhi followed close at a 1.7 percentage point decrease. Clark County was the only county to show an increase—1.1 percent—to a rate of 5.9 percent.

Nonfarm Payroll Jobs in the LMA decreased by 660 jobs from November, mostly in the *Goods-Producing Industries*. *Construction* accounted for 590 of those jobs as would be expected during that time of year. *Manufacturing* and *Mining* accounted for the rest of the jobs at 110 jobs combined. *Service-Providing Industries* showed a gain of 40 jobs; *Leisure & Hospitality* was the largest contributor.

Year-over-year, *Nonfarm Payroll Jobs* increased by 560 jobs as gains in *Goods-Producing Industries* (130 jobs) added to gains in *Service-Providing Industries* (430 jobs). *Construction* and *Health Services*, which are growing sectors in the LMA,

Northeast Idaho Table 1: Labor Force & Employment
Bonneville, Bingham, Butte, and Jefferson Counties

	Dec 2003*	Nov 2003	Dec 2002	% Change From Last Month	Last Year
INDIVIDUALS BY PLACE OF RESIDENCE					
<i>Seasonally Adjusted</i>					
Civilian Labor Force	81,510	81,610	83,290	-0.1	-2.1
Unemployment	2,900	3,060	3,330	-5.2	-12.9
% of Labor Force Unemployed	3.6	3.8	4.0		
Total Employment	78,610	78,550	79,950	0.1	-1.7
<i>Unadjusted</i>					
Civilian Labor Force	80,850	81,920	82,160	-1.3	-1.6
Unemployment	2,960	2,790	3,330	6.1	-11.1
% of Labor Force Unemployed	3.7	3.4	4.1		
Total Employment	77,880	79,130	78,830	-1.6	-1.2
JOB BY PLACE OF WORK					
Nonfarm Payroll Jobs** - NAICS	63,200	63,860	62,640	-1.0	0.9
<i>Goods-Producing Industries</i>	9,550	10,250	9,420	-6.8	1.4
Natural Resources & Mining	50	70	70	-28.6	-28.6
Construction	4,770	5,360	4,140	-11.0	15.2
Manufacturing	4,730	4,820	5,210	-1.9	-9.2
Food Manufacturing	2,450	2,440	2,760	0.4	-11.2
Fabricated Metal Product Manufacturing	290	290	280	0.0	3.6
Machinery Manufacturing	470	440	440	6.8	6.8
Other Manufacturing	1,520	1,650	1,730	-7.9	-12.1
<i>Service-Providing Industries</i>	53,650	53,610	53,220	0.1	0.8
Trade, Transportation & Utilities	14,600	14,570	14,440	0.2	1.1
Wholesale Trade	4,850	4,840	4,750	0.2	2.1
Retail Trade	7,790	7,750	7,880	0.5	-1.1
Utilities	100	100	100	0.0	0.0
Transportation	1,860	1,880	1,710	-1.1	8.8
Information	770	770	900	0.0	-14.4
Financial Activities	1,930	1,940	2,000	-0.5	-3.5
Professional & Business Services	11,580	11,610	11,680	-0.3	-0.9
Educational & Health Services	6,500	6,530	6,070	-0.5	7.1
Leisure & Hospitality	5,020	4,920	4,880	2.0	2.9
Other Services	2,080	2,090	2,250	-0.5	-7.6
Government Education	5,060	5,090	5,090	-0.6	-0.6
Government Administration	6,110	6,090	5,910	0.3	3.4

*Preliminary Estimate

**Full- or part-time jobs of people who worked for or received wages in the pay period including the 12th of the month

were the strong contributors while *Manufacturing* experienced the largest loss. *Food Manufacturing* lost 310 jobs, while *Other Manufacturing* (which includes all manufacturing except *Food*, *Fabricated Metal Products*, and *Machinery*) lost 210 jobs. *Food Manufacturing* in the LMA consists mostly of potatoes, a product that has slightly dropped in sales nationwide, partially due to the recent popularity of low-carbohydrate diets.

SPECIAL TOPIC: Sales Tax Data for 2003 and 2002

According to the Idaho State Tax Commission, total sales in Northeast Idaho for 2003 were almost \$3.5 billion. Compared to totals from 2002, that is a gain of almost \$232 million. In comparing quarterly data for 2003 to 2002, the largest gains occurred in the third and fourth quarters, with increases of \$112 million and \$111 million, respectively. Third quarter data for 2002

shows that Bonneville County recorded only \$35.8 million in sales when it normally sees over \$500 million. In this same quarter, Ada County (Boise area) only had \$10 million in sales compared to a normal \$2 billion plus. Fourth quarter comparisons show increases across all counties, with Bonneville County topping them at \$79 million in total sales for the quarter. Lemhi County showed a \$14 million increase for fourth quarter sales in 2003 compared to fourth quarter in 2002, followed by Teton County at almost \$7 million. Custer County had a gain of \$4.5 million. Overall, 2002 was a cautious year in Northeast Idaho (generally no big moves or investments) due to a slump in the national economy and the threat of an impending war with Iraq. Consumers were again cautious at the beginning of 2003; however growing confidence was evident by mid-year and the year ended strong in terms of sales.

AREA DEVELOPMENTS

Bonneville County

- Officials in Bonneville and Bingham Counties are working to acquire a \$100 million wind farm. Planning boards from both Bonneville and Bingham Counties have approved special land-use permits. The next step is to obtain a power contract from a utility. The proposed wind farm will generate 100 megawatts of electricity a year, enough to sustain power for 40,000 homes, and could be expanded to generate 300 megawatts over time. It will have fewer than 100 windmills and will be located in a 12-mile by 6-mile rectangle to parallel Bone Road east and southeast of Idaho Falls. The area was chosen because of smooth and steady wind patterns that speed up after they cross the plains and hit the ridge of the hills. The project is a joint venture between Ridgeline Energy of Medina, Washington, and Airtricity of Dublin, Ireland. After initial construction, the site will employ 12 maintenance workers.
- Citizens Community Bank opened a branch in Ammon next to Edwards Cinema and Johnny Carino's. The bank started up in 1997, has two existing branches in Pocatello, and opened a real estate and construction lending office on Woodruff Avenue in Idaho Falls three years ago. The new bank in Ammon will now include the real estate and construction lending office under the same roof.
- Melaleuca Inc., a health, household, and cosmetic manufacturer and supplier, has announced plans to build one large central location for its separate facilities to unify under one roof. Currently the company has 100,000-square feet in warehouse space spread throughout several locations in Idaho Falls. The new facility will be built on 150 acres of land southwest of the intersection of Interstate 15 and York Road, just outside of Idaho Falls city limits. Groundbreaking on the new \$30 million facility will take place this spring and completion is not expected until approximately 2009. The company employs over 1,000 workers in

Idaho Falls and has locations in Rexburg and Knoxville, Tennessee.

- Since Idaho Governor Dirk Kempthorne moved administration of the Community Reuse Organization (CRO) funds from Eastern Idaho Economic Development Council (EIEDC) to the Regional Development Alliance, EIEDC has reduced its staff and funds have been reduced to one-third the original budget. The CRO funds were established by the Department of Energy to offset the impact of job cutbacks at the Idaho National Engineering and Environmental Laboratory. Chris Hertz, the previous executive director of EIEDC, resigned at the end of 2003 for personal reasons. The new executive director, Kipp Hicks, has been with the council since 2000.

Madison County

- The Church of Jesus Christ of Latter-day Saints announced it would build a third Idaho temple to be located in Rexburg where it owns Brigham Young University – Idaho (BYU-I). The temple will be constructed on the southwest corner of the intersection of Second East and Seventh South Streets, south of the BYU-I campus on the hill. The church already owns the site. The groundbreaking date and architectural plans have not been announced, but are expected soon.

Jefferson County

- A new leather shop called Thundercloud Leather opened recently north of Rigby near the Sugar Factory Smokehouse off of Highway 20. Leather crafter Marc Nielson ran a leather shop in Arizona for nearly 15 years before moving to Rigby five years ago. Nielson specializes in making custom belts, checkbooks, wallets, purses, planners, and scripture covers. He also repairs saddles. The phone number is 390-7178.
- Brown's, a long-time grocery store in Ririe, announced it would officially close when the shelves are emptied. The business first started in the 1950's when two Brown brothers bought out the Red and White grocery store and expanded it. Eugene Brown eventually bought out his brother and ran the store until he was 87. He died in 1999. His daughter, Lita McCall, has been running it for the past several years, but decided to close the store when the supplier, Fleming Foods, filed for Chapter 11 bankruptcy in April 2003. Unable to locate a supplier allowing the store to offer groceries at competitive prices, McCall decided to close. It will affect approximately ten employees.

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FOR YOUR INFORMATION

**THE STATEWIDE LABOR FORCE:
2003 SUMMARY**

The preliminary annual average unemployment rate in 2003 was 5.3 percent, down five-tenths of a percentage point from the 2002 annual average rate of 5.8 percent, as seen on FYI Table 1. This decrease follows the nine-tenths of a percent increase from 2001 to 2002. Although the economy struggled during the year, Idaho's annual average *Civilian Labor Force* increased from 2002 by 4,781 persons to 689,530. The increase resulted from an additional 7,687 employed individuals. The number of unemployed individuals in 2003 decreased 7.3 percent (2,906 individuals) compared to a 19.3 percent (6,409 individuals) increase between 2001 and 2002.

The nation's preliminary 2003 average unemployment rate was 6.0 percent compared to 5.8 percent in 2002.

**COUNTY AND AREA LABOR FORCE:
2003 SUMMARY**

FYI Table 8 on pgs. 26-27 provides the 2003 Annual Average Labor Force details for Idaho counties, major cities, and labor market areas.

The 2003 annual average unemployment rates in Idaho counties and LMAs ranged from a high of 14.2 percent to a low of 1.8 percent. This large spread is one of the more telling signs that Idaho's economic structure is not homogeneous throughout the state and that, in fact, much of the economic influences on Idahoans are local or regional. The persistence of high, average, or low unemployment rates in individual counties is a pattern that has lasted throughout recent years. The mix of overall economic conditions in the regions and counties has not changed dramatically in the last five years.

The preliminary 2003 annual labor force data indicates that Adams County had the highest county annual unemployment rate at 13.9 percent. This was followed by Shoshone County at 11.0 percent and Washington County at 10.4 percent. Adams and Washington Counties form the Central Idaho-Oregon border. (The border is easy to spot: it is known as Hells Canyon!).

These mountainous, sparsely populated counties traditionally have relied on wood products, ranching, and gov-

ernment as the sources of most of the jobs. As jobs are lost in the wood products industries, a general downturn has evolved that is likely to persist until replacement industries are found.

Three additional counties had double-digit annual average unemployment rates in 2003: Shoshone County at 11.6 percent (up slightly from 11.4 percent in 2002); Benewah County at 10.1 percent (improved from 11.6 percent in 2002); and Clearwater County also at 10.1 percent (down from 13.5 percent in 2002). Shoshone County has been the center of Idaho's metal mining (gold, silver, and lead) industry for decades. But the cost of mining, international competition, and low silver and gold prices have caused a near disappearance of the industry. Although the area still has known mineral reserves, attempts are being made to diversify by developing tourist and recreational attractions as well as other industries. For example, one of the nation's largest e-business car dealerships is located in the area with cars sold nationally via the Internet.

Benewah and Clearwater Counties, also in northern Idaho, are significantly dependent upon timber industries for jobs.

Two counties south of the Salmon River registered annual average unemployment rates below 3.0 percent for 2003. Madison County in eastern Idaho had the lowest rate of all counties at 1.8 percent and Owyhee County in Idaho's southwest corner had a rate of 2.3 percent. Madison County is in the heart of Idaho's higher elevation potato farming area as well as the home of Idaho's largest private university, BYU—Idaho. Owyhee County is predominantly ranching and range land and is sparsely populated. In addition to these two counties with less than 3.0 percent unemployment, 11 counties had annual average unemployment rates at 4.0 percent or less. In 2002, there were only seven Idaho counties with an annual average unemployment rate of 4.0 percent or less.

Idaho has eight designated LMAs, including two MSAs. (Note that the Pocatello MSA is listed as Bannock County in FYI Table 8 on page 27 because the county boundaries are the same as the MSA's boundaries.) Ex-

cept for the Pocatello MSA, these are multi-county areas determined by commuting patterns and labor market similarity. The Idaho-Lewis LMA had the highest annual average unemployment rate at 7.8 percent. It was followed closely by the Panhandle LMA at 7.7 percent. These two northern Idaho

FYI Table 1: Idaho Labor Force Data—Annual Averages 1999-2003

STATE OF IDAHO	1999	2000	2001	2002	2003	% Chg
Civilian Labor Force	651,090	657,712	681,558	684,749	689,530	0.7
Unemployment	33,697	31,914	33,274	39,683	36,777	-7.3
Percent Labor Force Unemployed	5.2	4.9	4.9	5.8	5.3	
Employment	617,393	625,798	648,283	645,066	652,753	1.2

counties typically had the highest unemployment rates throughout 2003 and both traditionally have been dependent on forest industries. However, the Cassia-Minidoka LMA in South Central Idaho, which is not forest industries dependent, also had a high annual average unemployment rate. This area is predominantly agricultural and the home of several major food processing facilities. These facilities have experienced layoffs, reduced production, and one major closure.

The Boise City MSA has about 36 percent of the state labor force. Its 2003 annual average unemployment rate was 5.3 percent, just below the state's average of 5.4 percent.

NONFARM EMPLOYMENT: 2003 SUMMARY AND A LOOK AHEAD

Idaho began 2003 still in the shadow of the national recession that officially ended thirteen months before. According to the Bureau of Economic Research, the recession spanned only eight months, from March 2001 through November 2001, but its negative employment effects still lingered. Nationally and within Idaho, employment gains lagged and what growth there was, was small. FYI Table 2 provides historical data on total number of *Nonfarm Payroll Jobs* from 1999 to 2003.

The largest recession-specific development in Idaho was the loss of 4,000 jobs in the electronics manufacturing industries because business investment declined during the recession. Compounding the recessionary effects, Idaho also was experiencing longer-term structural declines in its wood products industries and in food processing. These three large industries sell to the global market and are very sensitive to economic conditions external to the state. Business travel and tourism still suffered from fallout of the September 11 effects and that resulted in job losses within the state's hospitality industries.

Idaho experienced employment growth in 2003 despite the negative factors working against it. Population growth continued and expanded the demand for goods and services locally. Idaho's unemployment rate did not exceed 6.0 percent and was well below that of some of its neighboring states, particularly California, Oregon, and Washington. In addition, the annual average number of total *Nonfarm Payroll Jobs* hit a record high.

The change in the annual average year-over-year number masks the net gain of 20,787 jobs from January

FYI Table 2: Annual Average <i>Nonfarm Payroll Jobs</i> '99-03					
	1999	2000	2001	2002	2003
Nonfarm Payroll Jobs	538,148	558,588	568,033	568,203	571,747
# Change	17,642	20,440	9,445	170	3,544
% Change	3.4	3.8	1.7	0	0.6

FYI Table 3: Changes in # of <i>Nonfarm Payroll Jobs</i> —2003				
	High Point		Change	
	Jan-03	Sep-03	Dec-03	Jan – Dec
Nonfarm Payroll Jobs	555,327	582,624	576,114	20,787

to December 2003 (see FYI Table 3). A rapid build-up of jobs occurred between February and June with monthly increases of 4,000 to 9,000 jobs. Both the *Goods-Producing Industries* and the *Service-Providing Industries* added jobs, but the services group added nearly fourteen times as many jobs. The *Goods-Producing Industries* experienced a 1.4 percent increase year-over-year compared to a 4.2 percent increase in the *Service-Providing Industries*. See FYI Table 4 for month-over-month changes in these categories for 2003.

Area developments sections throughout the newsletter provide more detail on the labor market developments through the state and some thoughts on what might be expected in the coming year or two.

Nonfarm Payroll Jobs data can also be viewed by super sectors, which are major industry groupings for the place of work employment data. FYI Table 5 on page 24 summarizes the overall changes that occurred in 2003 as compared to the same array of jobs in 2002. The *Educational & Health Services* sector added the most jobs and increased the most percentage-wise, clearly outdistancing the second-ranking industry sector. The education components of this sector represent private educational facilities and services. Idaho has three private colleges/universities of substantial size—BYU-Idaho, Northwest Nazarene University, and Albertson College of Idaho—and many private elementary/secondary schools, mainly church-related. The health services component includes hospitals, clinics, doctors' offices, and facilities such as nursing homes. The employment

FYI Table 4: *Nonfarm Payroll Jobs* 2003—Month-Over-Month Changes

	Jan	Feb	March	April	May	June	July	Aug	Sept	Oct	Nov	Dec	# Change	% Change
TOTAL	555,32	556,46	561,412	566,136	571,959	581,381	574,872	578,246	582,624	579,790	576,640	576,114	20,787	3.7
Goods-Producing Industries	99,105	98,231	97,687	99,079	101,221	104,647	105,637	106,280	105,923	104,533	102,552	100,536	1,431	1.4
Service-Providing Industries	456,222	458,237	463,725	467,057	470,738	476,734	469,235	471,966	476,701	475,257	474,088	475,578	19,356	4.2

FYI Table 5: Annual Average *Nonfarm Payroll Jobs* by Industry Super Sectors

Industry	Annual Average		2002 -2003 Change	
	2002	2003*	Number	Percent
NONFARM PAYROLL JOBS - NAICS	568,203	571,747	3,545	0.62
Goods Producing Industries	105,074	102,119	-2,955	-2.81
Natural Resources and Mining	3,771	3,599	-172	-4.56
Construction	36,468	36,541	73	0.2
Manufacturing	64,835	61,979	-2,856	-4.4
Service-Providing Industries	463,128	469,628	6,500	1.4
Trade, Transportation, & Utilities	115,961	115,535	-426	-0.37
Information	9,161	9,149	-12	-0.13
Financial Activities	25,842	26,944	1,102	4.26
Professional & Business Services	69,002	70,204	1,202	1.74
Educational & Health Services	59,825	62,558	2,733	4.57
Leisure & Hospitality	53,260	54,208	948	1.78
Total Government	112,036	112,813	776	0.69

State Developments Table 6: Idaho Nonfarm Payroll Jobs—Annual Average Employment—Industries to Watch

Industry	Annual Average		2002 -2003 Change	
	2002	2003*	Number	Percent
NONFARM PAYROLL JOBS— NAICS	568,203	571,747	3,545	0.62
Logging	2,021	1,820	-201	-9.96
Metal Ore Mining	540	504	-36	-6.62
Construction	36,468	36,541	73	0.2
Wood Product Manufacturing	7,544	7,177	-367	-4.87
Computer & Electronic Product Mfg.	17,933	16,360	-1,573	-8.77
Fruit & Vegetable Preserving & Specialty Food	8,459	7,807	-652	-7.71
Retail Trade	72,370	72,427	57	0.08
Administrative and Support Services	32,035	32,905	870	2.72
Accommodation	7,710	7,694	-15	-0.2
Food Services & Drinking Places	38,310	38,975	664	1.73
State & Local Government	98,477	99,132	655	0.66

growth in this sector is due largely to continued population growth. However, changing demographics, (i.e., an aging population), and technological changes and specialization in medicine have also contributed to this sector's growth.

Changes in *Nonfarm Payroll Jobs* results in this total employment/jobs structure for the state:

- 5.5 percent of jobs are in *Agriculture*
- 8.4 percent of workers are *Self-Employed* (only)
- 86.1 percent of Idaho workers have *Nonfarm Payroll Jobs*
 - » 18.6 percent of those jobs are in *Goods-Producing Industries* (*Natural Resources, Construction, and Mining*)
- The *Service-Providing Industries* increased their share of *Nonfarm Payroll Jobs* from 79.5 percent in 1998 to 82.1 percent in 2003.

Throughout 2003 this newsletter has maintained a focus on certain industries that are either cornerstones of Idaho's economy or have experienced significant

changes during the year. The industries are summarized on FYI Table 6 as the industries to watch.

Goods-Producing Industries

- *Mining*, especially metals and phosphate, is almost non-existent due to costs and prices, which are driven by imports. Although there probably is little chance of a significant employment increase, mines in Shoshone County have hired a few new workers and plans have been announced to resume some silver mining. There also is some possibility that a new silver and cobalt refinery may be built. Any large employment gains are not expected until 2005 and will most likely number fewer than 200 workers.
- *Logging* employs about 1,800 workers, but has declined in recent years. The near-term employment levels should stay about the same unless demand for cut timber suddenly increases or forest management policies include increased logging, mainly for thinning for fire abatement and disease control.

- *Construction* has remained surprisingly strong. Increased population, low interest rates, and commercial developments have maintained a strong pace. A slowdown due to slower population growth and good housing inventories is anticipated, but some state-funded projects are coming on line.

Manufacturing

- Idaho's traditional manufacturing industries have been in wood products, food products, chemicals (phosphate-related), and paper.
- In 2000, these traditional industries had about 30,000 jobs. In three years, that total has declined to 26,500.
- Further job declines are expected in manufacturing industries. Principal reasons are unfavorable market conditions, international and domestic competitors, and changing consumer preferences.
- Electronic and electrical equipment rose rapidly in the last two decades with employment peaking at just over 20,000 jobs in 2001. Now there are about 16,000 jobs. The average annual pay in these businesses is more than double the amount of other job categories.
- The electronics industry is primed for resurgence. Idaho has the production capacity, relative low energy costs, and a qualified labor supply and is ready for a general, national expansion in business investments. There are signs these conditions will exist in 2004 and nearly 2,000 jobs will be created.
- *Fruit & Vegetable Preserving* is a major part of Idaho's food processing industry, and potato products are a major part of the preserving industry. The market for frozen French fries and other products has become very tight for Idaho producers and Idaho production plants. Changing consumer tastes, transportation costs, and international competition has been shrinking the demand for Idaho potato products. A large processing plant in Heyburn was closed and other plants have reduced production.

Service-Providing Industries

- *Retail Trade* has the most jobs and will continue to grow along with population. Though it is difficult to measure the impact of Internet shopping on local retail sales, electronic shopping for computers, books, clothes, music, etc. is providing strong competition to local retailers. The 2003 Christmas holiday shopping season was good, but not great, and seasonal hiring was below normal.
- About one-half of the jobs in *Local Government* are in the K-12 public school system and student populations are expected to continue to increase, but funding constraints will continue to moderate the staffing increases.
- About 48 percent of *State Government* jobs are in the public post-secondary education system. This sector,

too, is experiencing very tight budget limitations and institutions have put cost-cutting measures in place, including hiring reviews.

- *Health Care* has been one of the fastest growing industries in the state and that trend will continue in spite of rising health costs.
- *Administrative & Support Services* include two industries that have been of particular interest recently. Call centers have emerged as a prominent Idaho industry and can be located almost anywhere. This has been a boon for several small rural communities where several firms have established centers. However, the advent of the "no call list" programs and the reliance on contracts for work in the call center business have resulted in some of the centers reducing staff or closing. The call center industry remains viable, however, and employs about 6,500 workers in Idaho. The other industry of note is temporary employment agencies that hire workers for all types of businesses. Employment in these agencies is extremely variable and is often thought of as an indicator of business conditions. Firms whose business is expanding might elect to use temporary workers until the employer is sure business conditions warrant hiring of new employees. There were 12,000 to 16,000 workers in Idaho attached to this industry during the year.

The Bottom Line

- Idaho should have slow but sure, widespread employment growth in 2004 under current conditions. Only the traditional industries are expected to decline at the recent pace.
- If business investments expand, Idaho's electronics industry will also expand and provide a stimulus to all parts of the economy.
- Significant threats to expected growth include drought, unexpected high energy costs, large layoffs in electronics, large federal cutbacks at the Idaho National Engineering and Environmental Laboratory and Mountain Home Air Force Base, and failure to make necessary infrastructure investments.

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F.Y.I. Tables

FOR YOUR INFORMATION

FYI Table 7: Annual Average Unemployment Rates by County

County	1992	1993	1994	1995	1996	1997	1998	1999	2000	2001	2002	2003
Ada	4.3	4.0	3.5	3.5	3.3	3.2	3.1	3.3	2.9	3.3	4.7	4.7
Adams	13.9	14.6	11.8	14.2	14.3	14.4	14.6	14.9	13.0	13.8	14.2	14.2
Bannock	7.5	6.4	6.2	5.9	5.4	5.5	4.9	5.3	5.0	4.8	6.4	5.2
Bear Lake	5.3	5.9	6.0	5.1	5.0	4.6	4.5	4.6	5.9	5.0	5.5	5.2
Benewah	11.5	10.9	10.0	10.6	11.5	10.3	11.8	12.6	12.5	10.6	11.6	10.1
Bingham	6.3	5.8	5.9	5.6	5.3	5.0	4.9	5.1	4.6	4.6	4.5	4.3
Blaine	7.4	5.9	5.2	4.3	4.1	4.9	3.9	3.7	3.3	2.9	4.1	4.0
Boise	7.7	7.3	6.1	5.1	5.9	6.8	5.9	7.6	7.1	5.0	5.7	6.7
Bonner	10.2	9.9	8.6	9.0	9.3	8.8	8.2	9.5	9.0	8.4	8.8	7.6
Bonneville	4.9	4.4	4.3	4.3	4.1	3.9	3.6	3.6	3.4	3.4	3.6	3.3
Boundary	9.6	9.3	8.8	8.8	9.5	8.9	9.0	9.2	8.7	9.1	8.6	8.7
Butte	7.3	6.3	5.0	4.0	4.7	4.8	4.2	4.0	3.7	3.9	4.3	4.8
Camas	5.9	4.8	2.5	3.1	4.4	4.5	3.5	4.3	4.1	4.9	4.0	6.8
Canyon	6.7	6.6	5.9	5.6	5.3	5.5	5.0	4.8	4.5	5.0	6.7	6.7
Caribou	6.6	7.1	7.5	6.8	6.5	6.2	5.9	6.1	6.0	5.8	7.6	7.4
Cassia	8.2	8.6	8.0	6.6	6.2	7.0	7.0	6.8	6.3	5.6	6.4	6.5
Clark	4.5	5.7	4.4	4.4	3.6	4.3	3.8	3.5	4.8	4.3	5.2	5.0
Clearwater	15.5	15.8	14.7	13.2	11.9	12.4	12.8	13.5	14.4	15.1	13.5	10.1
Custer	9.6	15.3	8.3	5.8	6.1	7.0	8.6	8.1	7.2	7.6	8.3	6.6
Elmore	7.0	7.2	6.6	6.0	6.1	6.3	5.9	6.5	6.1	6.1	7.8	6.9
Franklin	3.5	3.5	3.5	4.2	4.4	4.1	3.5	3.5	3.9	4.0	4.3	3.4
Fremont	8.5	9.1	8.3	8.4	7.9	7.8	7.0	6.9	7.0	6.5	5.9	5.8
Gem	8.2	7.8	6.6	7.5	7.1	6.8	6.9	6.9	5.8	8.0	9.7	7.5
Gooding	5.1	5.4	4.3	4.1	4.2	4.2	3.8	3.6	3.8	3.5	3.7	3.7
Idaho	11.8	13.0	11.4	11.6	11.1	10.9	10.6	10.7	10.2	9.8	9.5	8.7
Jefferson	6.1	5.4	5.4	5.1	4.7	4.4	4.3	4.4	3.9	3.7	4.0	3.7
Jerome	6.6	6.6	5.1	4.6	4.3	4.7	4.5	4.5	4.4	3.8	4.2	4.1
Kootenai	7.9	8.0	7.5	7.6	7.9	8.5	7.8	8.0	7.5	8.2	8.2	7.2
Latah	3.8	3.5	2.9	3.0	3.2	3.6	3.4	3.3	3.5	3.6	3.6	3.2
Lemhi	10.7	10.8	8.3	7.2	8.2	9.2	8.5	8.0	9.0	7.6	7.4	6.8
Lewis	6.5	8.5	6.8	7.0	7.2	7.7	7.4	6.8	7.6	7.7	7.1	3.9
Lincoln	6.6	6.1	4.8	4.1	4.8	5.2	5.0	5.4	4.9	4.0	5.5	5.2
Madison	2.9	3.1	3.3	3.3	3.2	3.3	2.8	2.6	2.5	2.0	1.9	1.8
Minidoka	8.7	9.1	8.7	7.7	7.1	8.2	8.0	7.6	7.3	6.4	7.6	8.1
Nez Perce	4.5	3.9	3.5	4.1	3.5	3.6	3.7	3.9	4.1	4.2	4.0	3.5
Oneida	5.0	3.6	3.7	4.0	3.1	3.5	3.6	3.9	3.6	3.6	4.3	3.9
Owyhee	5.8	5.6	3.3	3.1	3.0	2.8	2.7	4.4	4.2	4.5	5.1	2.3
Payette	10.1	8.6	8.4	7.0	7.0	7.9	6.7	7.4	7.4	8.4	9.6	9.3
Power	7.4	5.4	7.2	6.9	6.2	6.3	5.7	7.2	7.0	7.2	9.2	9.4
Shoshone	16.1	14.3	11.6	10.5	10.0	10.4	11.1	11.6	11.1	12.4	11.4	11.6
Teton	4.0	4.1	3.7	3.3	4.7	4.8	3.6	3.5	3.1	2.5	4.0	3.9
Twin Falls	7.1	6.7	5.0	4.8	4.5	4.6	4.7	4.8	4.4	4.1	4.3	4.0
Valley	10.3	11.3	8.7	9.1	9.3	10.0	9.3	9.3	7.8	8.3	9.2	8.4
Washington	10.3	9.0	9.6	8.8	8.1	8.2	7.0	8.4	9.2	8.9	10.4	10.6
State of Idaho	6.5	6.2	5.6	5.4	5.2	5.3	5.0	5.2	4.9	4.9	5.8	5.4

SOURCE: Research & Analysis and Public Affairs, Idaho Department of Labor — February 27, 2004

FYI Table 8: 2003 Annual Average Labor Force Data — Idaho Counties, Cities, and Labor Market Areas

COUNTY/AREA	CIVILIAN LABOR FORCE	UNEMPLOYMENT	PERCENT UNEMPLOYED	TOTAL EMPLOYMENT
ADA	176,819	8,271	4.7	168,548
ADAMS	1,827	259	14.2	1,568
BANNOCK	40,525	2,106	5.2	38,419
BEAR LAKE	3,056	160	5.2	2,897
BENEWAH	4,229	429	10.1	3,801
BINGHAM	22,591	977	4.3	21,615
BLAINE	12,497	501	4.0	11,996
BOISE	2,629	176	6.7	2,453
BONNER	17,872	1,355	7.6	16,517
BONNEVILLE	49,834	1,669	3.3	48,166
BOUNDARY	4,447	386	8.7	4,062
BUTTE	1,590	76	4.8	1,514
CAMAS	464	32	6.8	432
CANYON	70,261	4,741	6.7	65,520
CARIBOU	3,185	235	7.4	2,950
CASSIA	10,228	663	6.5	9,565
CLARK	562	28	5.0	534
CLEARWATER	3,696	372	10.1	3,324
CUSTER	2,279	151	6.6	2,128
ELMORE	9,795	677	6.9	9,117
FRANKLIN	5,426	182	3.4	5,244
FREMONT	5,023	294	5.8	4,729
GEM	5,994	452	7.5	5,543
GOODING	7,564	280	3.7	7,284
IDAHO	6,728	584	8.7	6,144
JEFFERSON	10,433	385	3.7	10,048
JEROME	10,097	414	4.1	9,683
KOOTENAI	59,482	4,260	7.2	55,222
LATAH	16,175	520	3.2	15,655
LEMHI	3,853	263	6.8	3,591
LEWIS	1,518	59	3.9	1,459
LINCOLN	2,231	116	5.2	2,115
MADISON	11,905	213	1.8	11,692
MINIDOKA	9,993	808	8.1	9,185
NEZ PERCE	24,080	847	3.5	23,233
ONEIDA	1,743	68	3.9	1,675
OWYHEE	4,136	97	2.3	4,039
PAYETTE	9,679	900	9.3	8,779
POWER	3,201	300	9.4	2,901
SHOSHONE	6,215	718	11.6	5,497
TETON	3,872	153	3.9	3,720
TWIN FALLS	36,503	1,475	4.0	35,027
VALLEY	4,081	344	8.4	3,737
WASHINGTON	4,223	446	10.6	3,777
ASOTIN WA	12,569	760	6.0	11,809

(Cont. on next page)

FYI Table 8 (cont.): 2003 Annual Average Labor Force Data — Idaho Counties, Cities, and Labor Market Areas

AREA	CIVILIAN LABOR FORCE	UNEMPLOYMENT	PERCENT UNEMPLOYED	TOTAL EMPLOYMENT
STATE OF IDAHO	692,543	37,440	5.4	655,103
LABOR MARKET AREAS*				
BOISE CITY MSA	247,081	13,012	5.3	234,069
BONNEVILLE LMA	84,448	3,106	3.7	81,342
CASSIA-MINIDOKA LMA	20,221	1,471	7.3	18,750
IDAHO-LEWIS LMA	8,246	643	7.8	7,603
MAGIC VALLEY LMA	54,164	2,169	4.0	51,994
PANHANDLE LMA	92,246	7,148	7.7	85,098
SEAPORT LMA	36,649	1,607	4.4	35,042
IDAHO CITIES				
BOISE	111,893	5,178	4.6	106,716
COEUR D' ALENE	21,011	1,153	5.5	19,858
IDAHO FALLS	30,774	1,075	3.5	29,699
LEWISTON	20,562	633	3.1	19,929
NAMPA	21,500	1,558	7.2	19,942
POCATELLO	29,015	1,485	5.1	27,530
TWIN FALLS	19,092	810	4.2	18,282
The Pocatello MSA is listed as Bannock County in the county portion of this table.				
Source: Idaho Department of Labor				
Benchmarked Data - February 27, 2004				

FYI Table 9: Nonfarm Payroll Jobs—Place of Work—STATE OF IDAHO—Annual Average Employment

Industry	Annual Average 2002	Annual Average 2003*	2002 -2003 Change	
			Number	Percent
Nonfarm Payroll Jobs - NAICS	568,203	571,747	3,545	0.62
Goods Producing	105,074	102,119	-2,955	-2.81
Natural Resources and Mining	3,771	3,599	-172	-4.56
Logging	2,021	1,820	-201	-9.96
Mining	1,750	1,779	29	1.67
Metal Ore Mining	540	504	-36	-6.62
Construction	36,468	36,541	73	0.20
Manufacturing	64,835	61,979	-2,856	-4.40
Durable Goods	40,298	37,995	-2,303	-5.72
Wood Product Manufacturing	7,544	7,177	-367	-4.87
Sawmills & Wood Preservation	3,064	2,948	-116	-3.79
Veneer & Engineered Wood Products	1,256	1,192	-63	-5.04
Other Wood Product Manufacturing	3,224	3,037	-188	-5.83
Fabricated Metal Product Manufacturing	3,632	3,557	-75	-2.07
Machinery Manufacturing	2,831	2,627	-204	-7.22
Computer & Electronic Product Man	17,933	16,360	-1,573	-8.77
Transportation Equipment Manufacturing	2,119	2,227	108	5.12
Other Durable Goods	6,238	6,058	-180	-2.89
Non-Durable Goods	24,537	23,985	-552	-2.25
Food Manufacturing	16,358	15,879	-478	-2.92
Fruit & Vegetable Preserving & Specialty Food	8,459	7,807	-652	-7.71
Paper Manufacturing	1,679	1,625	-54	-3.21
Printing and Related Support Activities	2,034	2,091	56	2.77
Chemical Manufacturing	1,926	1,821	-104	-5.41
Other Nondurable Goods	2,408	2,568	160	6.65
Service-Providing	463,128	469,628	6,500	1.40
Trade, Transportation, and Utilities	115,961	115,535	-426	-0.37
Trade	97,311	96,820	-491	-0.50
Wholesale Trade	24,941	24,393	-548	-2.20
Wholesalers, Durable Goods	11,534	11,244	-289	-2.51
Wholesalers, Nondurable Goods	11,516	11,171	-345	-3.00
Retail Trade	72,370	72,427	57	0.08
Motor Vehicle and Parts Dealers	10,596	10,833	236	2.23
Building Material and Garden Equipm	7,650	7,606	-44	-0.57
Food and Beverage Stores	12,539	12,370	-169	-1.35
General Merchandise Stores	14,707	15,046	339	2.30
Transportation, Warehousing, & Utilities	18,650	18,715	65	0.35
Utilities	1,923	1,872	-52	-2.70
Transportation & Warehousing	16,726	16,843	117	0.70
Rail Transportation	1,303	1,303	0	0.00
Truck Transportation	8,206	8,233	27	0.33
Information	9,161	9,149	-12	-0.13
Telecommunications	3,214	3,181	-33	-1.03
Financial Activities	25,842	26,944	1,102	4.26
Finance & Insurance	19,302	20,045	743	3.85
Real Estate & Rental & Leasing	6,540	6,899	359	5.49
Professional and Business Services	69,002	70,204	1,202	1.74
Professional, Scientific, & Technical	28,466	28,902	436	1.53
Scientific Research and Development	7,371	7,350	-21	-0.29
Management of Companies & Enterpr	7,476	7,338	-139	-1.85
Administrative & Support & Waste Management	33,060	33,964	905	2.74
Administrative and Support Services	32,035	32,905	870	2.72
Educational and Health Services	59,825	62,558	2,733	4.57
Educational Services	6,261	6,903	642	10.25
Health Care & Social Assistance	53,564	55,655	2,091	3.90
Hospitals	13,312	13,203	-109	-0.82
Leisure and Hospitality	53,260	54,208	948	1.78
Arts, Entertainment, & Recreation	7,240	7,539	299	4.13
Accommodation & Food Services	46,020	46,669	649	1.41
Accommodation	7,710	7,694	-15	-0.20
Food Services & Drinking Places	38,310	38,975	664	1.73
Other Services	18,043	18,219	176	0.97
Total Government	112,036	112,813	776	0.69
Federal Government	13,559	13,681	122	0.90
State & Local Government	98,477	99,132	655	0.66
State Government	28,798	28,674	-124	-0.43
State Government Education	13,540	13,694	153	1.13
State Government Administration	15,258	14,980	-277	-1.82
Local Government	69,679	70,458	779	1.12
Local Government Education	36,112	35,638	-473	-1.31
Local Government Administration	30,881	31,950	1,069	3.46
Local Government Tribes	2,686	2,869	183	6.82

Source: Idaho Department of Labor — February 24, 2004

FYI Table 10: State of Idaho Resident Labor Force—Monthly and Annual Averages 2000-2001

February 28, 2004

Seasonally Adjusted Labor Force By Place of Residence	JAN 2000	FEB 2000	MAR 2000	APR 2000	MAY 2000	JUNE 2000	JULY 2000	AUG 2000	SEP 2000	OCT 2000	NOV 2000	DEC 2000	AA 2000
	JAN 2001	FEB 2001	MAR 2001	APR 2001	MAY 2001	JUNE 2001	JULY 2001	AUG 2001	SEP 2001	OCT 2001	NOV 2001	DEC 2001	AA 2001
Civilian Labor Force	649,500	651,100	651,100	653,900	655,400	656,200	658,000	659,600	661,500	663,300	665,300	667,200	
Unemployment	32,300	32,400	31,100	31,800	31,700	31,800	32,000	31,700	32,000	31,900	32,200	32,000	
Percent of Labor Force Unemployed	5.0	5.0	4.8	4.9	4.8	4.8	4.9	4.8	4.8	4.8	4.8	4.8	
Total Employment	617,200	618,700	620,000	622,100	623,700	624,400	626,000	627,900	629,500	631,400	633,100	635,200	
Unadjusted													
Civilian Labor Force	640,400	642,200	644,200	647,500	655,700	666,100	669,100	667,900	665,000	664,600	665,800	664,000	657,700
Unemployment	40,600	41,000	37,500	33,300	30,100	28,800	28,300	28,600	26,100	26,000	29,400	33,300	31,900
Percent of Labor Force Unemployed	6.3	6.4	5.8	5.1	4.6	4.3	4.2	4.3	3.9	3.9	4.4	5.0	4.9
Total Employment	599,800	601,200	606,700	614,200	625,600	637,300	640,800	639,300	638,900	638,600	636,400	630,700	625,800
U. S. Seasonally Adjusted Rate	4.0	4.1	4.0	3.9	4.1	4.0	4.1	4.1	4.0	3.9	4.0	4.0	4.0
Seasonally Adjusted Labor Force By Place of Residence	JAN 2001	FEB 2001	MAR 2001	APR 2001	MAY 2001	JUNE 2001	JULY 2001	AUG 2001	SEP 2001	OCT 2001	NOV 2001	DEC 2001	AA 2001
Civilian Labor Force	667,200	671,100	674,600	678,200	680,100	682,500	684,200	686,800	687,600	689,600	691,400	693,300	
Unemployment	30,100	31,400	31,800	33,300	33,300	33,500	33,800	33,800	34,800	35,300	36,700	37,900	
Percent of Labor Force Unemployed	4.5	4.7	4.7	4.9	4.9	4.9	4.9	4.9	5.1	5.1	5.3	5.5	
Total Employment	637,100	639,700	642,800	644,900	646,800	649,000	650,400	653,000	652,800	654,300	654,700	655,400	
Unadjusted													
Civilian Labor Force	656,500	661,100	667,500	673,000	681,200	692,500	695,500	696,000	691,400	690,200	691,400	690,300	682,200
Unemployment	37,900	39,600	37,600	34,900	31,700	30,500	30,200	30,400	28,800	29,400	34,400	40,600	33,800
Percent of Labor Force Unemployed	5.8	6.0	5.6	5.2	4.7	4.4	4.3	4.4	4.2	4.3	5.0	5.9	5.0
Total Employment	618,600	621,500	629,900	638,100	649,500	662,000	665,300	665,600	662,600	660,800	657,000	649,700	648,400
U. S. Seasonally Adjusted Rate	4.2	4.2	4.3	4.5	4.4	4.6	4.6	4.9	5.0	5.4	5.6	5.8	4.8

FYI Table 10 (cont.): State of Idaho Resident Labor Force—Monthly and Annual Averages 2002-2003

Seasonally Adjusted Labor Force													
By Place of Residence	JAN 2002	FEB 2002	MAR 2002	APR 2002	MAY 2002	JUNE 2002	JULY 2002	AUG 2002	SEP 2002	OCT 2002	NOV 2002	DEC 2002	AA 2002
Civilian Labor Force	686,300	686,300	685,200	685,200	683,600	684,500	685,100	683,500	686,500	682,600	683,400	684,500	
Unemployment	39,700	40,200	40,300	39,800	38,400	39,200	39,700	39,200	37,500	39,600	40,800	41,600	
Percent of Labor Force Unemployed	5.8	5.9	5.9	5.8	5.6	5.7	5.8	5.7	5.5	5.8	6.0	6.1	
Total Employment	646,600	646,100	644,900	645,400	645,200	645,300	645,400	644,300	649,000	643,000	642,600	642,900	
Unadjusted													
Civilian Labor Force	675,800	676,600	678,400	680,600	684,700	695,200	696,800	693,200	690,400	681,900	682,700	680,600	684,400
Unemployment	48,200	48,900	46,500	41,800	36,800	35,900	35,800	35,200	31,400	33,100	38,700	43,700	39,800
Percent of Labor Force Unemployed	7.1	7.2	6.9	6.1	5.4	5.2	5.1	5.1	4.5	4.9	5.7	6.4	5.8
Total Employment	627,600	627,700	631,900	638,800	647,900	659,300	661,000	658,000	659,000	648,800	644,000	636,900	644,600
U. S. SEASONALLY ADJUSTED RATE	5.6	5.7	5.7	5.9	5.8	5.8	5.8	5.7	5.7	5.7	5.9	6.0	5.8
Seasonally Adjusted Labor Force													
By Place of Residence	JAN 2003	FEB 2003	MAR 2003	APR 2003	MAY 2003	JUNE 2003	JULY 2003	AUG 2003	SEP 2003	OCT 2003	NOV 2003	DEC 2003*	AA 2003*
Civilian Labor Force	689,200	689,800	690,700	691,100	692,000	693,000	693,800	693,500	693,100	694,600	694,400	695,300	
Unemployment	38,600	38,300	38,500	38,500	38,200	37,900	38,800	37,800	36,400	36,400	35,000	34,900	
Percent of Labor Force Unemployed	5.6	5.6	5.6	5.6	5.5	5.5	5.6	5.5	5.3	5.2	5.0	5.0	
Total Employment	650,600	651,500	652,200	652,600	653,800	655,100	655,000	655,700	656,700	658,200	659,400	660,400	
Unadjusted													
Civilian Labor Force	679,500	681,400	685,000	687,200	693,700	704,000	704,900	701,000	695,000	693,800	693,300	691,600	692,500
Unemployment	47,200	46,800	45,000	40,900	36,700	34,500	35,300	33,800	29,500	29,800	32,600	37,100	37,400
Percent of Labor Force Unemployed	6.9	6.9	6.6	6.0	5.3	4.9	5.0	4.8	4.2	4.3	4.7	5.4	5.4
Total Employment	632,300	634,600	640,000	646,300	657,000	669,500	669,600	667,200	665,500	664,000	660,700	654,500	655,100
U. S. SEASONALLY ADJUSTED RATE	5.8	5.9	5.8	6.0	6.1	6.3	6.2	6.1	6.1	6.0	5.9	5.7	6.0

in Coeur d'Alene where it employs about 50 people. In late 2003, Spokane International Airport offered to build a new aircraft maintenance facility for Empire Airlines. If Empire accepted the offer, it would have moved its corporate headquarters from Government Way in Coeur d'Alene to the Spokane airport. Jobs Plus and the Panhandle Area Council put together a \$3.2 million incentive package that convinced Empire to choose Idaho. Kootenai County will build a new hangar at the Coeur d'Alene Airport to house Empire's maintenance operations that will employ about 40 people. When the hangar is completed in August, a 12,000-square-foot office building will be built at the airport to house Empire's corporate headquarters. Empire will keep 12 workers in Spokane to do light maintenance. Aircraft requiring more extensive work will be ferried to the Coeur d'Alene airport. The Empire move has the potential to add 35 to 40 jobs, as well as help develop Coeur d'Alene Airport and make it more likely to attract other businesses. A major airport expansion planned for this summer includes construction of a north taxiway, allowing the opening of new hangars and businesses.

Shoshone County

- Formation Capital Corp., based in Vancouver, British Columbia, recently announced plans to reopen the hydrometallurgical refinery at the

Sunshine Mine at Big Creek by this summer. The refinery will refine copper/cobalt concentrates from the company's Idaho Cobalt Project near Salmon, as well as custom refining of gold and silver. Initially, the refinery will employ about 14 people. Employment could rise to 30 people when the refinery reaches full capacity.

- Hecla Mining's Lucky Friday mine near Mullan has major plans for expansion and exploration over the next two years, as mentioned in the January edition of *Idaho Employment*. Those plans already are affecting the mine's employment. It hired six new people in December and seven more in January, bringing employment up to 104 people. Between February and April, it plans to hire 10 more workers.
- Another business recently hired more than 10 Shoshone County workers. Northpoint Financial Group call center in Smelterville hired 15 employees for the center that opened in late February. By the end of the year, it plans to increase its workforce to about 100.

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South Central Idaho News — (continued from page 16)

ner of F and Lincoln Streets in Jerome. The primary optometrist, Dr. Richard Murray, has over 20 years of experience and is a Magic Valley native. Currently he practices in the Boise area in addition to his duties at Lifetime Optical. The center offers over 2,000 frames to choose from, including prescription sunglasses and clip-ons. Nearly all insurance plans are accepted. In addition to weekday hours, the center will be open on Sundays at least through its first six months.

Cassia and Minidoka Counties

- Bob Shepard of Baker City, Oregon, was named the new economic development director of the Mini-Cassia Economic Development Commission. Shepard has served as the economic devel-

opment director at Baker City and in other capacities related to economic development, including regional director for the Small Business Development Center at Boise State University. A review board of local business leaders and members of the Southern Idaho Economic Development Organization selected Shepard from a field of 40 applicants from around the country. He started his new position February 1.

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Glossary of Labor Market Terms

Agriculture Employment: Persons on agriculture payrolls who work or receive pay for any period during the survey week. This includes owners, operators, unpaid family members who work at least 15 hours a week, and hired laborers.

Average Hourly Earnings/Average Weekly Hours: The average total money earnings earned by production or non-supervisory workers for selected industries. The average number of hours worked by production or non-supervisory workers including overtime, paid vacation, and sick leave. The data is collected for the week including the 12th of the month.

Average Weekly Earnings: Average Hourly Earnings multiplied by Average Weekly Hours.

Civilian Labor Force: A count of non-institutional persons 16 years of age and over residing within a specific geographic area, excluding members of armed forces, who are classified as employed, unemployed and seeking employment, or involved in a labor dispute.

Consumer Price Index (CPI): A national index measuring changes over time in the price of a fixed market basket of goods and services. There are two indexes—the All Urban Consumers (CPI-U) represents the buying habits of about 80 percent of the non-institutional population of the United States, and the Urban Wage & Clerical Workers (CPI-W) represents 40 percent of the population.

Covered Employers: Employers who are subject to state and federal Unemployment Insurance laws.

Durable Goods: Also known as “hard goods” because they include items manufactured or provided by wholesalers with a normal life expectancy of three years or more.

Employed: Individuals, 16 years of age or older, who worked at least 1 hour for pay or profit or worked at least 15 unpaid hours in a family business during the week including the 12th day of the month. Individuals are also counted as employed if they had a job but did not work because they were: ill, on vacation, in a labor dispute, prevented from working because of bad weather, or temporarily absent for similar reasons.

Initial Claim: Any notice of unemployment filed to request (1) a determination of entitlement to and eligibility for compensation or (2) a second or subsequent period of unemployment within a benefit year or period of eligibility.

Labor Market Area (LMA): An area that consists of a central city or cities and the surrounding territory within commuting distance. It is an economically integrated geographic area within which individuals can reside and find employment without changing place of residence. Idaho has nine LMAs.

Metropolitan Statistical Area (MSA): An area that has either a city with a population of at least 50,000 or a Bureau of Census urbanized area of at least 50,000 and a

total metropolitan area of at least 100,000. The Office of Management and Budget designates the MSAs. There are five MSAs in Idaho—Boise City-Nampa MSA (including Ada and Canyon Counties), Coeur d’Alene MSA (Kootenai County), Idaho Falls MSA (Jefferson and Bonneville Counties), Lewiston MSA (Nez Perce County in Idaho and Asotin County in Washington), Logan MSA (Franklin County and the Logan, Utah, Metro Area), and Pocatello City (Bannock County).

Nonfarm Wage & Salary Employment: Persons on nonfarm establishment payrolls (including employees on paid sick leave, paid holiday, or paid vacation) who work or receive pay for any part of the week including the 12th of the month. It is a count of jobs by place of work. It does not include self-employed, unpaid volunteer or family workers, domestic workers in households, military personnel and persons who are laid off, on leave without pay, or on strike for the entire reference period.

Nondurable Goods: Also known as “soft goods” because they include items manufactured or provided by wholesalers that generally last for only a short period of time (three years or less).

Seasonally Adjusted: Data is seasonally adjusted to remove the impact of regular events that occur at the same time every year such as the effect of cold weather on outdoor activities, the Christmas holiday, or the summer influx of youth into the labor market.

Unemployed: Those individuals, 16 years of age or older, who do not have a job but are available for work and actively seeking work during the week including the 12th of the month. The only exceptions to these criteria are individuals who are waiting to be recalled from a layoff and individuals waiting to report to a new job within 30 days—these, too, are considered unemployed.

Unemployment Insurance: Unemployment Insurance is a program for the accumulation of funds paid by employers, to be used for the payment of Unemployment Insurance to workers during periods of unemployment which are beyond their control.

Unemployment Rate: The number of persons unemployed expressed as a percentage of the labor force.

Weekly Benefit Amount: The amount payable to a claimant for a compensable week of total unemployment.

Weeks Claimed: The number of weeks that unemployed workers claimed Unemployment Insurance benefits.

Weeks Compensated: The number of weeks for which compensation was actually paid.